 The first step is to open any **Quote** and click **Send +**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

QUOTE PQUOTES +

Sell Process 1 2 3 4 5

2. Commit Order

Customer Vance Refrigeration (4)

Vance Refrigeration 350 Cliff St Scranton, PA 18503 UNITED STATES

Contact

Cust PO # 31401890

Owner elizabeth

Status Open

Notifier Options Normal

Inside Sales chris stearns

Outside Sales Ethan Wiggins

Area Sales Manager

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
1	BOM	1000	2022-03-24	2022-03-24	MN	20	\$7,703.90		\$8,000.00	\$154,078.00	\$0.00	\$160,000.00	<div><div></div><div></div><div></div><div></div></div>
			Ship	Dock	Main	1	Cost		Resale				Add

 The first option is to click (Quick) Then a PDF will open that you can download.

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt

VIEW & EDIT

SEND + PDF/EMAIL (QUICK)

Click here to print immediately.

EXCEL FILE

PRICE BOOK

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUTE

QUOTE PQUTES +

Sell Process 1 2 3 4 5

2. Commit Order

Customer Vance Refrigeration (4)

Vance Refrigeration 350 Cliff St Scranton, PA 18503 UNITED STATES

Contact

Cust PO # 31401890

Owner elizabeth

Status Open

Notifier Options Normal

Inside Sales chris stearns

Outside Sales Ethan Wiggins

Area Sales Manager

More Options





Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
1	BOM	1000	2022-03-24	2022-03-24	MN	20	\$7,703.90		\$8,000.00	\$154,078.00	\$0.00	\$160,000.00	   
			Ship	Dock	Main	1	Cost		Resale				Add

 The other option is to click **PDF/Email** This will open up another screen.

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt

VIEW & EDIT

SEND +

PDF/EMAIL (QUICK)

PRO FORMA PDF

EXCEL FILE

PRICE BOOK

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQQUOTE

QUOTE PQQUOTES +

Sell Process 1 2 3 4 5

2. Commit Order

Customer Vance Refrigeration (4)

Vance Refrigeration 350 Cliff St Scranton, PA 18503 UNITED STATES

Contact

Cust PO # 31401890

Owner elizabeth

Status Open

Notifier Options Normal

Inside Sales chris stearns

Outside Sales Ethan Wiggins

Area Sales Manager

More Options





Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
1	BOM	1000	2022-03-24	2022-03-24	MN	20	\$7,703.90		\$8,000.00	\$154,078.00	\$0.00	\$160,000.00	   
			Ship	Dock	Main	1	Cost		Resale				Add

 Here you can customize the PDF. Un-check any boxes you don't want to show on the PDF.

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQQUOTE

QUOTE PQQUOTES +

Customize PDF

☐ Bold Row

<input checked="" type="checkbox"/> Header Comment	<input checked="" type="checkbox"/> Quote Internal Name	<input checked="" type="checkbox"/> Bill To	<input checked="" type="checkbox"/> Ship To	<input checked="" type="checkbox"/> Show Tech Comments	<input checked="" type="checkbox"/> Sales Contacts
<input checked="" type="checkbox"/> Ship Type	<input checked="" type="checkbox"/> Totals	<input checked="" type="checkbox"/> Ship Via	<input checked="" type="checkbox"/> Shipping Instructions	<input checked="" type="checkbox"/> Show Quote Rev	<input checked="" type="checkbox"/> Show Carrier Account
<input checked="" type="checkbox"/> Prcpart	<input checked="" type="checkbox"/> PRC	<input checked="" type="checkbox"/> Veight	<input checked="" type="checkbox"/> Part #	<input checked="" type="checkbox"/> Customer Part	<input checked="" type="checkbox"/> Revision
<input checked="" type="checkbox"/> Ship Date	<input checked="" type="checkbox"/> Dock Date	<input checked="" type="checkbox"/> Lead Time	<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Resale	<input checked="" type="checkbox"/> Tax
<input checked="" type="checkbox"/> Ext. Price	<input checked="" type="checkbox"/> Discount	<input checked="" type="checkbox"/> Part Description	<input checked="" type="checkbox"/> Tech Description	<input checked="" type="checkbox"/> Line Comment	<input checked="" type="checkbox"/> Line Taxes
<input checked="" type="checkbox"/> Line Warnings	<input checked="" type="checkbox"/> Line Images	<input checked="" type="checkbox"/> ECCN	<input checked="" type="checkbox"/> COO	<input checked="" type="checkbox"/> Commissions Info	<input checked="" type="checkbox"/> part checkbox
<input checked="" type="checkbox"/> part radio					

Set Columns

Download PDF

Email PDF

PREVIEW

Quote 1308

CETEC ERP

Buyer: ||

Date: 2022-04-05 Revision: 1

From	Cetec ERP 1234 Main St	Bill To	Vance Refrigeration 350 Cliff St Scranton, PA 18503 UNITED STATES	Ship To	Vance Refrigeration 350 Cliff St Scranton, PA 18503 UNITED STATES
------	---------------------------	---------	--	---------	--

 Click **Set Columns** to save your changes.

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

QUOTE PQUOTES +

Customize PDF						<input type="checkbox"/> Bold Row
<input checked="" type="checkbox"/> Header Comment	<input checked="" type="checkbox"/> Quote Internal Name	<input checked="" type="checkbox"/> Bill To	<input checked="" type="checkbox"/> Ship To	<input checked="" type="checkbox"/> Show Tech Comments	<input checked="" type="checkbox"/> Sales Contacts	
<input checked="" type="checkbox"/> Ship Type	<input checked="" type="checkbox"/> Totals	<input checked="" type="checkbox"/> Ship Via	<input checked="" type="checkbox"/> Shipping Instructions	<input checked="" type="checkbox"/> Show Quote Rev	<input checked="" type="checkbox"/> Show Carrier Account	
<input checked="" type="checkbox"/> Prcpart	<input checked="" type="checkbox"/> PRC	<input type="checkbox"/> Weight	<input checked="" type="checkbox"/> Part #	<input checked="" type="checkbox"/> Customer Part	<input checked="" type="checkbox"/> Revision	
<input checked="" type="checkbox"/> Ship Date	<input checked="" type="checkbox"/> Dock Date	<input checked="" type="checkbox"/> Lead Time	<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Resale	<input checked="" type="checkbox"/> Tax	
<input checked="" type="checkbox"/> Ext. Price	<input checked="" type="checkbox"/> Discount	<input checked="" type="checkbox"/> Part Description	<input checked="" type="checkbox"/> Tech Description	<input checked="" type="checkbox"/> Line Comment	<input checked="" type="checkbox"/> Line Taxes	
<input checked="" type="checkbox"/> Line Warnings	<input checked="" type="checkbox"/> Line Images	<input checked="" type="checkbox"/> ECCN	<input checked="" type="checkbox"/> COO	<input checked="" type="checkbox"/> Commissions Info	<input checked="" type="checkbox"/> part checkbox	
<input checked="" type="checkbox"/> part radio						

Set Columns

Download PDF

Email PDF

PREVIEW

Quote 1308

CETEC ERP

There are two options. You can save the PDF by clicking **Download PDF**

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

QUOTE PQUOTES +

Customize PDF						<input type="checkbox"/> Bold Row
<input checked="" type="checkbox"/> Header Comment	<input checked="" type="checkbox"/> Quote Internal Name	<input checked="" type="checkbox"/> Bill To	<input checked="" type="checkbox"/> Ship To	<input checked="" type="checkbox"/> Show Tech Comments	<input checked="" type="checkbox"/> Sales Contacts	
<input checked="" type="checkbox"/> Ship Type	<input checked="" type="checkbox"/> Totals	<input checked="" type="checkbox"/> Ship Via	<input checked="" type="checkbox"/> Shipping Instructions	<input checked="" type="checkbox"/> Show Quote Rev	<input checked="" type="checkbox"/> Show Carrier Account	
<input checked="" type="checkbox"/> Prcpart	<input checked="" type="checkbox"/> PRC	<input type="checkbox"/> Weight	<input checked="" type="checkbox"/> Part #	<input checked="" type="checkbox"/> Customer Part	<input checked="" type="checkbox"/> Revision	
<input checked="" type="checkbox"/> Ship Date	<input checked="" type="checkbox"/> Dock Date	<input checked="" type="checkbox"/> Lead Time	<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Resale	<input checked="" type="checkbox"/> Tax	
<input checked="" type="checkbox"/> Ext. Price	<input checked="" type="checkbox"/> Discount	<input checked="" type="checkbox"/> Part Description	<input checked="" type="checkbox"/> Tech Description	<input checked="" type="checkbox"/> Line Comment	<input checked="" type="checkbox"/> Line Taxes	
<input checked="" type="checkbox"/> Line Warnings	<input checked="" type="checkbox"/> Line Images	<input checked="" type="checkbox"/> ECCN	<input checked="" type="checkbox"/> COO	<input checked="" type="checkbox"/> Commissions Info	<input checked="" type="checkbox"/> part checkbox	
<input checked="" type="checkbox"/> part radio						

Set Columns

Download PDF

Email PDF

PREVIEW

Quote 1308

CETEC ERP

Buyer: ||
Date: 2022-04-05 Revision: 1

From	Cetec ERP	Bill To	Vance Refrigeration	Ship To	Vance Refrigeration
------	-----------	---------	---------------------	---------	---------------------



The other option is to email the PDF directly to the customer by clicking **Email PDF**

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt ▼

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

QUOTE PQUOTES +

Customize PDF						<input type="checkbox"/> Bold Row
<input checked="" type="checkbox"/> Header Comment	<input checked="" type="checkbox"/> Quote Internal Name	<input checked="" type="checkbox"/> Bill To	<input checked="" type="checkbox"/> Ship To	<input checked="" type="checkbox"/> Show Tech Comments	<input checked="" type="checkbox"/> Sales Contacts	
<input checked="" type="checkbox"/> Ship Type	<input checked="" type="checkbox"/> Totals	<input checked="" type="checkbox"/> Ship Via	<input checked="" type="checkbox"/> Shipping Instructions	<input checked="" type="checkbox"/> Show Quote Rev	<input checked="" type="checkbox"/> Show Carrier Account	
<input checked="" type="checkbox"/> Prcpart	<input checked="" type="checkbox"/> PRC	<input type="checkbox"/> Weight	<input checked="" type="checkbox"/> Part #	<input checked="" type="checkbox"/> Customer Part	<input checked="" type="checkbox"/> Revision	
<input checked="" type="checkbox"/> Ship Date	<input checked="" type="checkbox"/> Dock Date	<input checked="" type="checkbox"/> Lead Time	<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Resale	<input checked="" type="checkbox"/> Tax	
<input checked="" type="checkbox"/> Ext. Price	<input checked="" type="checkbox"/> Discount	<input checked="" type="checkbox"/> Part Description	<input checked="" type="checkbox"/> Tech Description	<input checked="" type="checkbox"/> Line Comment	<input checked="" type="checkbox"/> Line Taxes	
<input checked="" type="checkbox"/> Line Warnings	<input checked="" type="checkbox"/> Line Images	<input checked="" type="checkbox"/> ECCN	<input checked="" type="checkbox"/> COO	<input checked="" type="checkbox"/> Commissions Info	<input checked="" type="checkbox"/> part checkbox	
<input checked="" type="checkbox"/> part radio						

Set Columns

Download PDF

Email PDF

PREVIEW

Quote 1308

CETEC ERP

Buyer: ||

Date: 2022-04-05

Revision: 1

From

Cetec ERP

Bill To

Vance Refrigeration

Ship To

Vance Refrigeration



Here you can add the sender's email address.

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt ▼

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

QUOTE PQUOTES +

Email PDF

From

from@example.com



To (comma delimited)

recipient@example.com

(Contacts) ▼

CC (comma delimited)

cc@example.com

(Contacts) ▼

BCC (comma delimited)

bcc@example.com

(Contacts) ▼

Subject

Cetec ERP - Quote #1308 (PO #31401890)

Body

Please see attachment.

Send

Help



Add the recipient's email address and customize your body text. If you have uploaded any documents to this quote, they will be listed here in checklist form so you have the option to attach them. When your email is ready, click **Send**.

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt ▼

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

QUOTE PQUOTES +

Email PDF

From

from@example.com



To (comma delimited)

recipient@example.com

(Contacts) ▼

CC (comma delimited)

cc@example.com

(Contacts) ▼

BCC (comma delimited)

bcc@example.com

(Contacts) ▼

Subject

Cetec ERP - Quote #1308 (PO #31401890)

Body

Please see attachment.

Send

Help



That's it. You're done.

Quote/Order Worksheet 1308

Sales Editing: Elizabeth Bernhardt ▼

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQUOTE
- QUOTE PQUOTES +

Email PDF

From

from@example.com

To (comma delimited)

recipient@example.com

(Contacts) ▼

CC (comma delimited)

cc@example.com

(Contacts) ▼

BCC (comma delimited)

bcc@example.com

(Contacts) ▼

Subject

Cetec ERP - Quote #1308 (PO #31401890)

Body

Please see attachment.

Send

Help



Scan to go to the interactive player