CHAPTER 10: QUOTATION TO CONTACTS

Objectives

The objectives for this chapter are:

- Set up customer templates.
- Create a sales quote using contact and customer template information.
- Convert a sales quote using contact and customer template information.
Introduction

Microsoft Dynamics® NAV offers the Quotation to Contact feature, which makes it possible to create sales, purchase, and service documents on the basis of a contact or a customer template instead of a customer.

The feature allows you to:

- Issue quotes to contacts from different countries.
- Use different language codes.
- Use different general, VAT, or customers business posting groups.
- Use different price group codes.

This chapter explains how to use the feature for creating sales quotes, and then how to set up customer templates and use them for converting quotes into orders.

Setting Up Customer Templates

Often, your contacts or prospective customers ask for quotes. Those contacts or potential customers may not yet be registered as customers in the program. For you to make sales quotes for them, you must use a customer template. By using the templates, you avoid the necessity of registering customers.

Customer templates are documents that contain business information about customers such as a currency code, territory code, general business posting group, VAT business posting group, customer posting group, and so on. Use a customer template to create a customer from a contact. In such a way, information from a customer template is passed to a contact card.

To set up a customer template, take the following actions:

1. In the navigation pane, click **Departments > Administration > Application Setup > Sales & Marketing > Sales > Customer Templates**. The list of the templates appears.
2. To create a new customer template, in the Action Pane, click **New**.

3. In the **Customer Template Card** window, fill in the **Code** and the **Description** fields for the new customer template.

4. Fill in the **Country/Region Code**, **Territory Code**, and **Currency Code** fields. If the contact is not a customer yet, these fields are used as search criteria by the program to match a contact with the customer template on the sales quote.

5. The **Gen. Bus. Posting Group** and the **Customer Posting Group** fields are mandatory and must also be filled in.

6. The remaining fields are optional and may be left empty.

You have now set up the customer template.

**FIGURE 10.2 THE NEW CUSTOMER TEMPLATE CREATED**

**Lab 10.1 – Set Up Customer Templates**

In this lab, you will practice creating a new customer template.

**Scenario**

You need to set up three customer templates to help ease your salespeople’s workload.

**Challenge Yourself**

You need to set up three customer templates with the following information:

<table>
<thead>
<tr>
<th>Option</th>
<th>Customer Template 1</th>
<th>Customer Template 2</th>
<th>Customer Template 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Platinum</td>
<td>Gold</td>
<td>Silver</td>
</tr>
<tr>
<td>Country/region</td>
<td>Great Britain</td>
<td>Great Britain</td>
<td>Great Britain</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
<td>EUR</td>
<td>AUD</td>
</tr>
</tbody>
</table>
Step by Step

*Set up the Platinum customer template for customers from Great Britain, who live in Scotland, use USD as currency, and their payment terms are 14 days.*

1. In the navigation pane, click **Departments > Administration > Application Setup > Sales & Marketing > Sales > Customer Templates.**
2. In the Action Pane, click **New** to create a new customer template.
3. In the **Code** and **Description** fields, enter “Platinum”.
4. Click the AssistButton next to the **Country/Region Code** field, and select GB for Great Britain.
5. Click the AssistButton next to the **Territory Code** field, and select Scotland.
6. Click the AssistButton next to the **Currency Code** field, and select USD.
7. Click the AssistButton next to the **Gen. Bus. Posting Group**, and select INTERCOMP.
8. Click the AssistButton next to the **Customer Posting Group** field, and select FOREIGN.
9. Click the AssistButton next to the **Payment Terms Code** field, and select 14 DAYS.
10. Click **OK** to store your customer template.

*Set up the Gold customer template for customers from Great Britain, who live in London, use EUR as currency, and their payment terms are seven days.*

1. On the list of the customer templates, click **New** to create a new customer template.
2. In the **Code** and **Description** fields, enter “Gold”.
3. Click the AssistButton next to the **Country/Region Code** field, and select GB for Great Britain.
4. Click the AssistButton next to the **Territory Code** field, and select London.
5. Click the AssistButton next to the **Currency Code** field, and select EUR.
6. Click the AssistButton next to the **Gen. Bus. Posting Group**, and select INTERCOMP.
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7. Click the AssistButton next to the **Customer Posting Group** field, and select FOREIGN.
8. Click the AssistButton next to the **Payment Terms Code** field, and select 7 DAYS.
9. Click **OK** to store your customer template.

*Set up the Silver customer template for customers from Great Britain, who live in London, use AUD as currency, and their payment terms are 14 days.*

1. On the list of the customer templates, click **New** to create a new customer template.
2. In the **Code** and **Description** fields, enter “Silver”.
3. Click the AssistButton next to the **Country/Region Code** field, and select GB for Great Britain.
4. Click the AssistButton next to the **Territory Code** field, and select London.
5. Click the AssistButton next to the **Currency Code** field, and select AUD.
6. Click the AssistButton next to the **Gen. Bus. Posting Group**, and select INTERCOMP.
7. Click the AssistButton next to the **Customer Posting Group** field, and select FOREIGN.
8. Click the AssistButton next to the **Payment Terms Code** field, and select 14 DAYS.
9. Click **OK** to store your customer template.
Using Contact and Customer Template Information

At a certain stage of a sales cycle, or when a contact with the opportunity is close to becoming a real customer, you may want to make a sales quote for that contact. You can specify that a quote is required at a certain stage when setting up sales cycles for the opportunity.

For creating sales quotes, information from either a contact card or a customer template is necessary.

NOTE: To be able to create a purchase quote, use a contact that is linked to a vendor. For creating a service quote, use a contact that is linked to a customer.

Creating a Sales Quote for the Opportunity

It is possible to create a sales quote for an opportunity that is assigned to a salesperson, campaign, or a contact. To read about working with opportunities, refer to the “Opportunity Management” chapter. This chapter discusses the opportunities that are assigned to salespeople.

If the contact involved in an opportunity is a customer, the program uses the customer information to create the quote.

If the contact is not yet a customer, you can still create the quote for the opportunity. In this case, the program uses the most appropriate customer template, or you can choose one yourself. The program uses search parameters such as country code, currency code, or territory code to select the customer template on the basis of the contact.

The following procedure shows how to create a sales quote for an opportunity assigned to a salesperson.

1. In the navigation pane, click the Administration Sales/Purchase button, and then click Salespeople/Purchasers. The list of the salespeople/purchasers appears.

2. Select the salesperson/purchaser for whom you have created the opportunity. Click Related Information > Salesperson > Opportunities > List. The Opportunity List window for the salesperson appears.
3. Select the opportunity and click Actions > Functions > Assign Sales Quote. The Sales Quote window appears.

**NOTE:** The opportunity must have the In Progress status.

**NOTE:** If the sales quote is already assigned to the opportunity, a warning message appears telling you about it. In that case, click Actions > Functions > Show Sales Quote.
FIGURE 10.4 A SALES QUOTE ASSIGNED

If the contact company selected in the sales quote in the **Sell-to Contact No.** field is linked to a customer, the program retrieves the customer information from the customer card.

**NOTE**: If a contact company is linked to a customer, the program fills in the **Sell-to Customer No.** field with the customer. If not, the field will be empty. Another way to verify if a contact is linked to a customer is to open the contact card for this contact and click **Related Information > Contact > Customer/Vendor/Bank Acc.** If a customer, vendor, or bank account card is shown, the contact is linked to either of them. If not, a warning message appears telling you about it.

If the contact company is not linked to a customer, and only one customer template is found with the same country code, currency code, and territory code as for the contact, the program fills in the **Sell-to Customer Template Code** field.

If more than one customer template fits the contact, select the relevant customer template by clicking the AssistButton next to the **Sell-to Customer Template Code** field.

4. Fill in the details of the **Sales Quote** window, print it, and send it to the company.
Creating a Sales Quote from the Sales Quotes Window

It is possible to make a sales quote in the Sales Quotes window for a contact that has not yet become a customer, and is not linked to any customer. If the quote later becomes an order, the program will prompt you to create the customer because an order can only be based on a customer record.

To create a sales quote for a contact that is not linked to a customer, perform the following steps:

1. In the navigation pane, click the Home button and then click Contacts. The list of the contacts appears.
2. Browse to the contact you want to create a sales quote for. For example, select contact CT100216, Bonnie Kearney. Click Related Information > Contact > Sales Quotes. The Sales Quote window appears.
3. In the Action Pane, click New to create a new sales quote.
4. Press ENTER to let the program enter the next available number for the sales quote.
5. The program fill in the Sell-to Contact No. field and other fields that relate to the selected contact.

FIGURE 10.5 A SALES QUOTE CREATED
6. To specify which customer template you want to use, click the AssistButton next to the Sell-to Customer Template Code field and select one from the list of templates.

7. Fill in the details of the Sales Quote window, print it, and send it to the customer.

**Converting a Sales Quote into a Sales Order**

When the contact is satisfied with the proposal, a sales quote can be converted into an order. The sales quote can be converted if a customer is assigned to it, since a sales order can be based only on customer information. To assign a customer to a quote you need to:

1. Register the customer in the program.
2. Link the customer to the contact the quote is created for.
3. Specify that this customer in the Sell-to Customer No. field on the sales quote that you are about to convert into an order.

However, you can skip creating a new customer and linking it to the contact. When you click Make Order, the program asks you if you want to transform the contact into a customer. If you select Yes, a customer is created for the contact and the quote is transformed into an order. For the program to create a customer from a contact, you must specify customer template in the Sell-to Customer Template Code field on the sales quote.

**NOTE:** If a sales quote has been created from the sales quote list and only a customer template is specified, you must specify a contact in the Sell-to Contact No. field. Now, the quote can be converted into an order.

To convert a sales quote into a sales order, perform the following procedure:

1. For a contact, open the list of the sales quotes with the quote you want to convert into a sales order.
2. Select a quote you want to convert to an order, and in the Action Pane, click Make Order. If the program finds that no customer is linked to this contact, you are prompted to create a customer now.

3. Create a customer by clicking Yes.

The program shows a message telling you that a customer was created. For creating a customer, the program used the information from the contact card and the customer template. Once the customer has been created, the contact becomes linked to that customer. This connection can be viewed in the Sales Quotes window for the contact.

The quote is transformed into a sales order. The program deletes the sales quote.
4. To open the created sales order, in the navigation pane, click **Home > Sales Orders**.
5. Browse to the order just created, print it and send to the customer.

**Lab 10.2 – Create a Sales Quote and a Sales Order**

In the lab, you will practice creating a sales quote and converting it into a sales order. This lab uses a customer template created in Lab 10.1.

**Scenario**

You receive a phone call from one your contacts, Kinnareds Traeindustri AB, about necessity of creating a sales quote for contact company Brille, who is from Great Britain. Brille is not registered as a customer.

Things go well, and Brille want to sign a contract. So you need to convert a quote into an order to Brille.

**Challenge Yourself**

1. Register a contact company Brille.
2. Create a sales quote for Brille with the customer template specified.
3. Convert it into a sales order.

**Need a Little Help?**

1. Create a contact card for the contact company Brille.
2. Create a sales quote for Brille. Assign the Platinum customer template to the sales quote.
3. Fill in the sales quote, print it, and send it to Kinnareds Traeindustri.
4. Convert a sales quote to the sales order.

**Step by Step**

*Create a contact card for the contact company Brille.*

1. On the list of the contacts, click **New**.
2. Press ENTER to let the program enter the next available number.
3. In the **Type** field, select Company.
4. Fill in contact information for Brille.
5. In the **Salesperson Code** field, select AH.

*Create a sales quote for Brille. Assign the Platinum customer template to the sales quote.*

1. Click **Related Information > Contacts > Sales Quotes**.
2. In the **Sales Quotes** window, click **New** to create a new sales quote.
3. Press ENTER to let the program enter the next available number for the sales quote.
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4. Click the AssistButton next to the **Sell-to Customer Template Code** field and select the Platinum template you created in lablab 10.1.
5. Click the AssistButton next to the **Salesperson Code** field and select RL for Richard Lum.

*Fill in the sales quote, print it, and send to Kinnareds Traeindustri AB.*

1. On the **Lines** FastTab of the **Sales Quote** window, fill in the line for office furniture.
2. In the Action Pane, click **Print**. Send the sales quote to Kinnareds Traeindustri AB by fax.

*Convert a sales quote to the sales order, print it, and send to Brille.*

1. To make an order, in the Action Pane, click **Make Order**.
2. Click **Yes**, when the program asks you whether you want to create a customer.
3. Open the list of the sales orders.
4. Browse to the order you just created, open it, print, and send to Brille by fax.
Summary

The Quotation to Contacts feature enables you to use contact information and customer templates for creating sales, purchase, and service documents.

The feature makes contact information sufficient for creating a sales quote. A customer template is sufficient for converting a sales quote into a sales order.
Test Your Knowledge

1. What is necessary for creating quotes?

2. True or False:
   An order can be based on a contact record.

3. Complete the following sentence:
   When you are creating a new customer template, the ______ and ______ fields are mandatory and must be filled in.

4. When you are creating a sales quote, more than one customer template fits the contact. How can you choose which template to use?
   ( ) The first one on the list will be used
   ( ) The last one on the list will be used
   ( ) The program chooses the suitable template
   ( ) You can choose a template by clicking the AssistButton next to the Sell-to Customer Template Code field
5. You are converting a sales quote into a sales order. You specified a contact and a customer template on the quote. What does the program ask while you are creating the order?
Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1. 

2. 

3. 
Solutions

Test Your Knowledge

1. What is necessary for creating quotes?

MODEL ANSWER:

To be able to make sales quotes, you must create and define one or more customer templates.

2. True or False:
An order can be based on a contact record.

False: An order can still only be based on a customer record.

3. Complete the following sentence:
When you are creating a new customer template, the _______ and _______ fields are mandatory and must be filled in.

MODEL ANSWER:

When you are creating a new customer template, the Gen. Bus. Posting Group and Customer Posting Group fields are mandatory and must be filled in.

4. When you are creating a sales quote, more than one customer template fits the contact. How can you choose which template to use?

   ( ) The first one on the list will be used
   ( ) The last one on the list will be used
   ( ) The program chooses the suitable template
   (√) You can choose a template by clicking the AssistButton next to the Sell-to Customer Template Code field

5. You are converting a sales quote into a sales order. You specified a contact and a customer template on the quote. What does the program ask while you are creating the order?

MODEL ANSWER:

The program asks whether you want to create a customer while converting a sales quote into a sales order.