



Update / Addition to Customer Quotation Reports

- 1) The “Customer Quotation Reports” section has changed slightly.
 - a. The Report choices will now stay at the top of your page
- 2) In addition, you will now be able to filter by “Vendor Product Groups” as well as “Quote Type”

- a. Product Groups are created in “Company Data” section and then can be selected during quotation creation
- b. Quote Type can also be selected during quotation creation. The default is “Project”

The screenshot displays the 'Customer Quotation Reports' interface. At the top, there is a header with the title 'Customer Quotation Reports'. Below the header, there are two main sections: 'Create Quotation Report' and 'Saved Quotation Reports'. The 'Create Quotation Report' section includes a dropdown menu for 'B BBBB Man Cablofil', a dropdown for 'Outside Salesperson' (with options: All, A_Morris, Chris, Dan, dslapppy, epollart), a checkbox for 'Include as Additional Salesperson', a dropdown for 'Divisions' (with options: All, Connecticut, Maine, Massachusetts, New England North, New England, New Hampshire), a dropdown for 'Groups' (with options: All, AARON, AD, AMPERE, CAPSTONE, Graybar Group, Graybar North), and a dropdown for 'Vendor Product Groups' (with options: All, Aluminum Wire Company--USE, Aluminum Wire Company--XHHW, Manufacturer T--Conduit). The 'Saved Quotation Reports' section includes a dropdown menu, a 'Run Report' button, and a 'Remove Report' button. Below these sections, there are dropdowns for 'Temp User', 'Inside Salesperson' (with options: All, *HS, Beth, Bob, fpollart, Hollie), 'Territories' (with options: All, 71-Chicagoland, Boston, Burlington, Concord, Fall River, Hartford), 'Quote Date' (with 'From' and 'To' input fields), and 'Quote Type' (with radio buttons for All, Project, and Stock).