



Save Customer Quotation Reports

1) From the Customer Quotation Reports make your selection and click “Create Quotation Report”

Customer Quotation Reports

Create Quotation Report

Saved Quotation Reports

Report Type	<input checked="" type="radio"/> Sort By Customer <input type="radio"/> Sort By Quote Name (list format) <input type="radio"/> Sort By Quote Name (list format w/Internal Notes) <input type="radio"/> Sort By Quote Name <input type="radio"/> Quotation Rollup	Status	All Buy Open Bid Won Lost Closed No Info
Customer	AARON SUPPLY-CHARLTON AARON SUPPLY-DAYVILLE AARON SUPPLY-DUDLEY AARON SUPPLY-FREETOWN AARON SUPPLY-JAY AARON SUPPLY-OSHGOSH AARON SUPPLY-TILTON AARON SUPPLY-WALPOLE AARON SUPPLY-WINNIT ABC ELECTRIC	Contractor	All AA Electric AAATest AARON SUPPLY AARON SUPPLY-DAYVILLE ABC Contracting Amey CAPSTONE CCWES Electric CCWW Electric
Vendor	All AA Man ABC Vendor Aluminum Wire Company Appleton Arlington B BBBB Man Cablofil	Quote Manager	All Freddy W Smith Jr Sally Jones Joe King Nick McCulloch Temp User
Outside Salesperson	All Chris Dan dslappey epollart Fred <input type="checkbox"/> Include as Additional Salesperson	Inside Salesperson	All *HS Beth fpollart Hollie joe
Divisions:	All Connecticut Maine Massachusetts New England North New England New Hampshire	Territories:	All Boston Burlington Concord Fall River Hartford Portland
Groups:	All AARON AD AMPERE CAPSTONE Graybar Group Graybar North	Quote Date	From <input type="text" value="01/01/2020"/> To <input type="text" value="09/07/2020"/>

2) Select "Save report" then enter a Report Name and click on "Save"

Compare Quotes		Combine Quotes		Export to Excel		Save Report					
Quotations Report Sorted By Customer											
Customer / Quote Name	Total	Notes	Status	Vendor	Quote Date	Contractor	Contact	Contact Email	Phone	Quote Manager	Distributor Sales
AARON SUPPLY											
CF - Dublin Road Water Plant Standby Power Project (Q-17329)	\$2,308.78	Notes	Buy	Manufacturer T	1/31/2020					Freddy W Smith Jr	nicholas
Description (Q-17446)	\$631,257.92	Notes	Buy	Manufacturer T	4/27/2020		John Jones		(617) 333-5555		nicholas
Hobbson (Q-17545)	\$954.80	Notes	Buy	Aluminum Wire Company	6/30/2020				(617) 333-5555		nicholas
roger that (Q-17495)	\$1.00	Notes	Buy	Manufacturer T	6/9/2020				(617) 333-5555		nicholas
Sample Email Contact (Q-17519)	\$2,613.00	Notes	Buy	Manufacturer T	7/1/2020		Sally Smith	sally@by.com	(617) 333-5555		nicholas
Sample Test (Q-17288)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
Tempo (Q-17572)					020				(617) 333-5555		nicholas
Tempo (Q-17573)					020				(617) 333-5555		nicholas
TEST (Q-17289)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17293)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17294)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17295)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17296)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17297)					020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17298)	\$1,801.38	Notes	Buy	Manufacturer T	1/20/2020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST (Q-17299)	\$1,801.38	Notes	Buy	Manufacturer T	1/20/2020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
test (Q-17300)	\$1,801.38	Notes	Buy	Manufacturer T	1/20/2020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
test multiple customers (Q-17369)	\$0.00	Notes	Buy	Manufacturer T	2/20/2020				(617) 333-5555	Freddy W Smith Jr	nicholas
TEST TEST (Q-17290)	\$1,801.38	Notes	Buy	Manufacturer T	1/20/2020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST TEST (Q-17291)	\$1,801.38	Notes	Buy	Manufacturer T	1/20/2020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
TEST TEST (Q-17292)	\$1,801.38	Notes	Buy	Manufacturer T	1/20/2020	CAPSTONE			(617) 333-5555	Freddy W Smith Jr	nicholas
AARON SUPPLY-CENTERVILLE											
Sample (Q-17504)	\$0.00	Notes	Buy	Aluminum Wire Company	6/11/2020	Cianbro					matthew
Sample D (Q-17543)	\$1.00	Notes	Buy	Aluminum Wire Company	6/30/2020				401-555-4545		matthew
sample factory quote (Q-17366)	\$1,000.00	Notes	Buy	Manufacturer T	2/20/2020				401-555-4545	Freddy W Smith Jr	matthew
Sample Mitch (Q-17511)	\$29,153.42	Notes	Buy	Aluminum Wire Company	6/18/2020	Cianbro	Larry		401-555-4545		matthew
test (Q-17432)	\$1.00	Notes	Buy	Manufacturer T	4/14/2020	Cianbro			401-555-4545		matthew
AARON SUPPLY-CHARLTON											
Sample Quotation Manager (Q-17502)	\$0.00	Notes	Buy	Manufacturer T	6/11/2020					Nick McCulloch	matthew
AARON SUPPLY DUBLIN											

Save Quotation Report Parameters

Save Report Name

3) Now from the Customer Quotation Reports screen you can select this report under “Saved Quotation Reports”

Customer Quotation Reports

Create Quotation Report

Saved Quotation Reports

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Aarron Supply 2020 Move Report

My Saved Report

Report Type

- Sort By Customer
- Sort By Quote Name (list format)
- Sort By Quote Name (list format w/Internal Notes)
- Sort By Quote Name
- Quotation Rollup

Customer

All

A Distributor

AA Electric

AAAA E Test

AAAA G Test

AAAA M Test

AARON SUPPLY

AARON SUPPLY-CENTERVILLE

Status

All

Buy

Open

Bid

Won

Lost

Closed

No Info

Contractor

All

AA Electric

AAATest

AARON SUPPLY

AARON SUPPLY-DAYVILLE

ABC Contracting

Amey

CAPSTONE