

AgWorks, Inc.

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Procedures for:

Converting a Quote to a Booking

AgWorks pursues a policy of continuous, ongoing development that ensures the highest quality standards combined with advanced, state-of-the-art technology for AgWorks products. For this reason, the features described in this Manual could differ from those in your current work environment.

Please contact AgWorks Support for any clarification needed
at (309) 623-4604, opt. 2 or support@agworks.net.

Revisions:

Version	Date	Author	Description
10.1.24 (124)	7/20/2012	Sara Toliver	Creation of document.

Definitions:

- **Quote:** a statement showing the price and quantity at which the company is willing to sell specific products or services to a specific customer valid for a specific length of time.
- **Booking:** an agreement to deliver a certain product at a certain price within a certain period of time.

Warning/Notice:

- The following assumes that the user has already created a Quote.

Procedures:

1. Within Delivery Doc, navigate to: Sales/Deliveries > Create Quote to a Booking
2. Select the desired Quote to convert to a Booking.
3. A new Booking will be generated based off of the information on the selected Quote.
 - A. If applicable, add a farm to the booking.

- i. This is required if you are creating a booking for a split farm partnership.
- B. If desired, modify the Booking expiration date.

- i. This date is set to determine when the booking is no longer valid, and when all products on the booking must be picked up by.
 - ii. You may use the drop down list to display a calendar, or use the “select date” button to choose from a pre-determined list.
- C. If you prefer, you may select “do not apply booking price to split partners”.

- i. This will ensure that the price agreement on the booking is not shared to amongst the split partners. The “master” on the customer account will receive the booked price. All other split partners will receive retail pricing, or the price that is on their prepay.
4. Click OK to save your changes and complete this task.

Examples:

When completed, your Booking may look something like this:

Product Name	Quantity	Confirmed	Price	Promo Item	Volume Discount
DKC53-41 AF2/Poncho 1250/bag [1 bag]	150 bag	0	\$349.90		2.00%
DKC61-19 AF/Poncho 1250/bag [1 bag]	200 bag	0	\$271.90		0.50%