

**Procedures for:**

Quotes

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](mailto:support@agworks.net).

**Revisions:**

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

**Overview:**

The following guide is to assist the user in the task of creating a Quote.

**Definitions:**

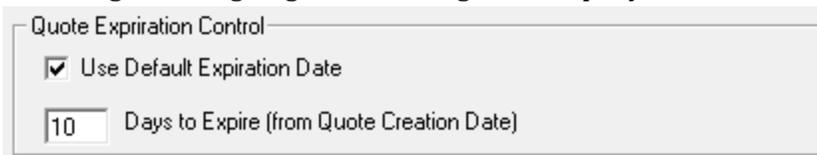
- **Quote:** a statement showing the price and quantity at which the company is willing to sell specific products or services to a specific customer valid for a specific length of time.

**Warning/Notice:**

- Within AgroDoc, users can create a Crop Plan which can be sent to Delivery Doc to create a Quote.
- Within Delivery Doc, users can create a Quote that can be converted to a Booking.
  - Therefore, users should quote the entire split.
    - Reason: Shipments will automatically reduce the Booking.
      - AgWorks’ design requires that the Booking reflect the total across the booked acres including all farm split partners.
  - Therefore, do not create the Booking for the landlord.
    - Reason: Farm splits are tied to the operators.

**Prerequisite:**

- A company administrator must determine if Quotes will have a default expiration. This can be managed through AgWorks Manager > Company > General Settings > Delivery Doc tab.



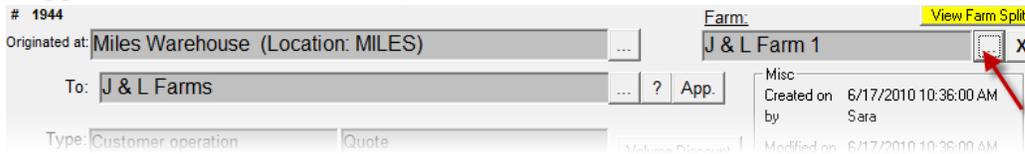
- If desired, this will need to be enabled per location.

# AgWorks, Inc.

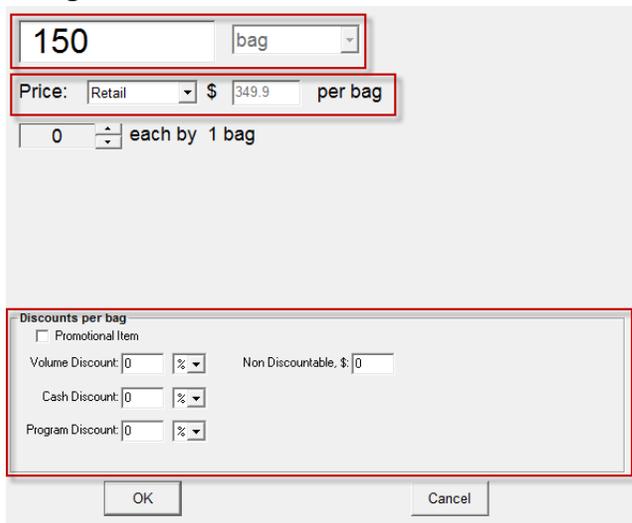
111 West 76<sup>th</sup> Street – Davenport, IA 52806

## Procedures:

1. Within Delivery Doc, navigate to: Sales/Deliveries > Add New, select Customer Operation, and then select Quote.
2. Select the Customer to create the Quote for.
  - A. Remember – if you are creating a Quote that will be converted to a Booking later for a split farm partnership, do not create the Quote for the landlord.
3. If applicable, add a farm to the Quote.



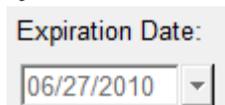
- A. This is required if you are creating a Quote that will be converted to a Booking later for a split farm partnership.
4. Add your product(s) to the Quote
  5. Enter your product quantity, pricing, and discount(s), if applicable. Click OK to save your changes.



6. Select an expiration date for the Quote.



- A. This date is set to determine when the Quote is no longer valid.
- B. If you have enabled the Quote Expiration Control within AgWorks Manager, this will be disabled, and the date will default to "x" number of days from the creation date on the Quote based off of the settings specified.



7. Click OK to save your changes and complete this task.

**Examples:**

When completed, your Quote may look something like this:

# 1946 Farm: **J & L Farm 1** [View Farm Split](#)

Originated at: **Miles Warehouse (Location: MILES)**

To: **J & L Farms** App.

Type: **Customer operation** Quote Volume Discount

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

Total: \$105543.40

Buttons: **Add** **Scan** **Edit** **Delete**

Comments:

Changes Log:

View: **MSDS** **LABEL** **WPS**

Print Changes Log

Buttons: **OK** **Print** **Cancel**

Misc

Created on 6/17/2010 10:59:00 AM by Sara

Modified on 6/17/2010 11:00:00 AM by Sara

Expiration Date: 06/27/2010

Quantities were changed

PO:

BOL:



**Timberland Heights**

1 Main St, Miles, IA 52064, Phone: (309) 623-4604 Fax: (563) 285-7841  
E-mail: sales@agsupplycompany.com Web: www.agsupplycompany.com  
**"Providing Professional Agronomy Services"**

Created: 6/17/2010 10:59:00AM by Sara

Current warehouse : Miles Warehouse



**J & L Farms**

12345 1st Street  
Davenport, IA 52804

**Quote # 1,946**

Phone: (563) 555-1234

Account: 10095

**Farm: J & L Farm 1**

#	Product ID	Product Name	Quantity	Unit Price	Subtotal
1	10,144	DKC53-41 AF2/Poncho 1250/bag [1 bag]	150 bag	\$342.902 / bag	\$51,435.30
<i>Retail \$349.90. This price included 2.00% volume discount total of \$7.00 per bag</i>					
2	10,140	DKC61-19 AF/Poncho 1250/bag [1 bag]	200 bag	\$270.5405 / bag	\$54,108.10
<i>Retail \$271.90. This price included 0.50% volume discount total of \$1.36 per bag</i>					
<b>Total:</b>					<b>\$105,543.40</b>