



Stock in the Channel

Module 4: Using the Quote Tool

Modern Selling How-To Guides

Intro

This Guide will show you how to build and populate a Basket to Quote a customer. In the following Module, we'll show you how to convert these Quotes to Sales Orders.

Please ensure you have the Quote Tool service included on your account, as well as the correct user permissions before continuing:
Quotes Tool users can only create and view Quotes that they have created for their customers, while Account Admins will be able to see all Quoting activity.

Similarly, before creating your first Quote please ensure you have completed the [Setting & Configurations Guide](#).



SINCH How-To Guides

Module 1: Getting Started with SINCH

Module 2: Creating Accounts & Contacts

Module 3: Working with Customer Groups

Module 4: Using the Quote Tool

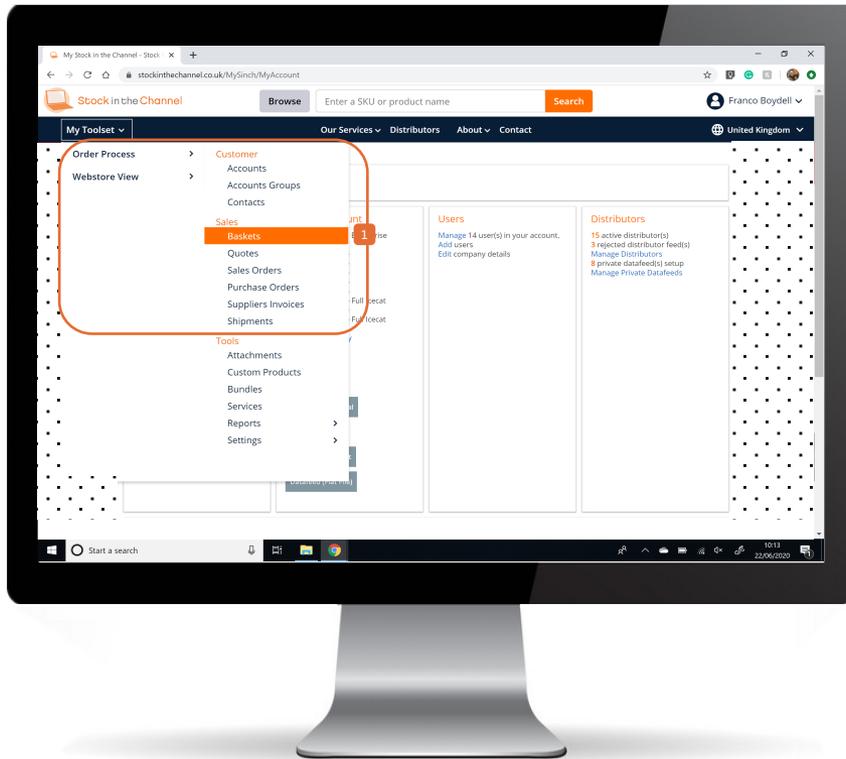
Module 5: Completing Purchase Orders

Module 6: Working With Magento Modules

Settings & Configurations Guide



Step 1

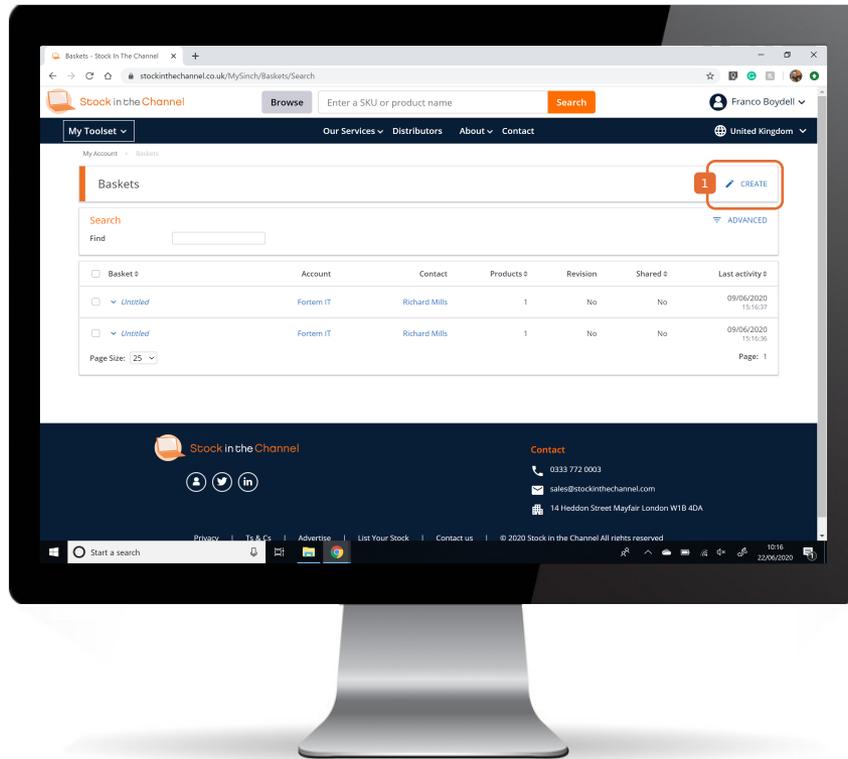


Log in to your Stock In The Channel account.

- 1 In the top left corner, click My Toolset and navigate to Baskets.

NB. Once you have created a Basket, it can be turned into a Quote and sent to the customer.

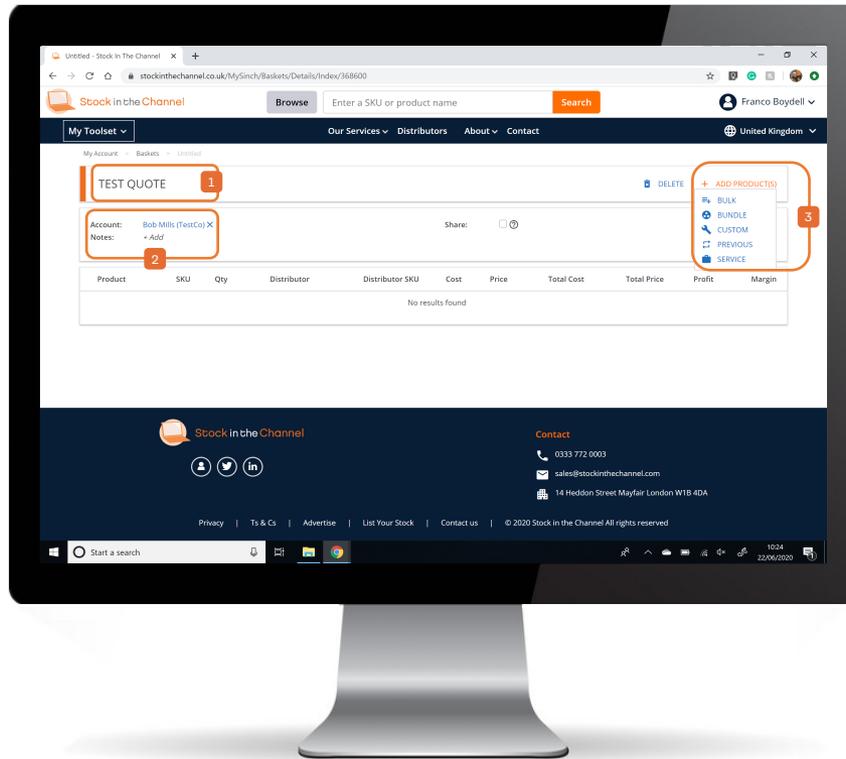
Step 2



Here you will see any previous Baskets you have created, for new users this will be blank.

- 1 Click Create to begin a new Basket.

Step 3

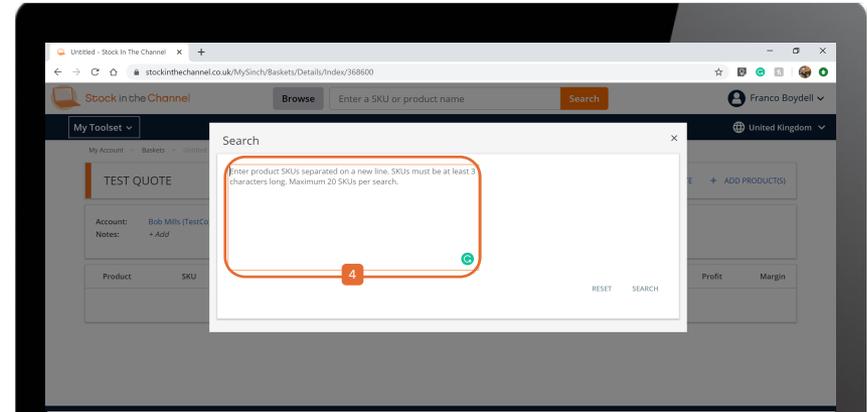
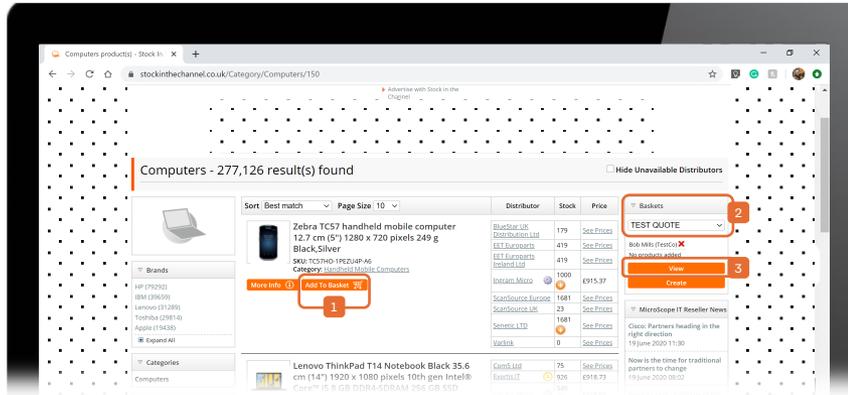


- 1 Start by naming your new basket.
- 2 Next, add the Account you are building a Basket for by searching for any Account or Contact's name. You can also Import any Contact from any connected External System, using the blue arrow.
- 3 There are six methods of adding Products to the basket directly from on the page.

BULK
BUNDLE
CUSTOM
PREVIOUS
SERVICE

The easiest way to add products to your basket is directly from the Search.

Step 4

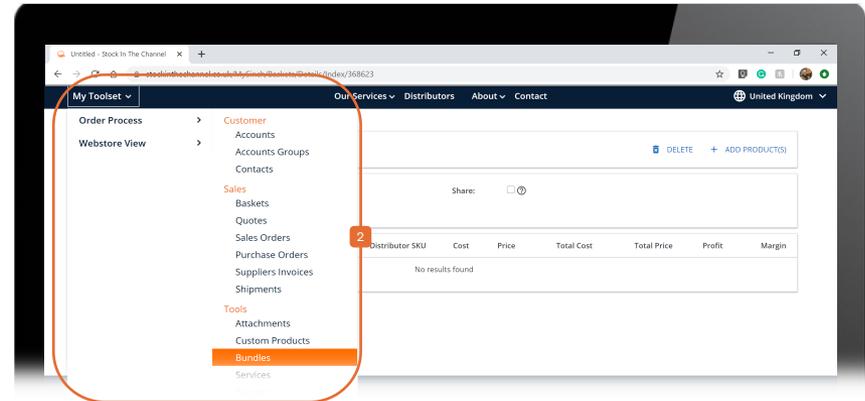
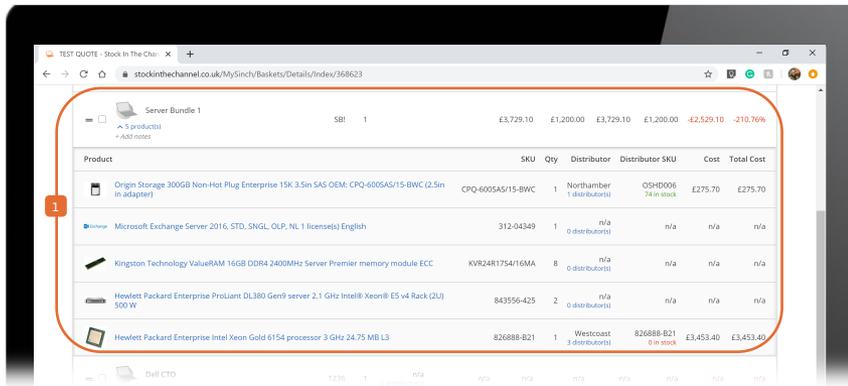


- 1 You can add as many products as you like to the Basket directly from SINCH Search.
- 2 You can work on multiple Baskets at the same time should you want, simply choose the right basket from the drop down.
- 3 Click View to return to the Basket.

- 4 In the Basket, BULK allows you to add up to 20 different products by inputting the product SKUs.

These SKUs could be a list of part numbers you've received from a customer.

Extra: Bundles



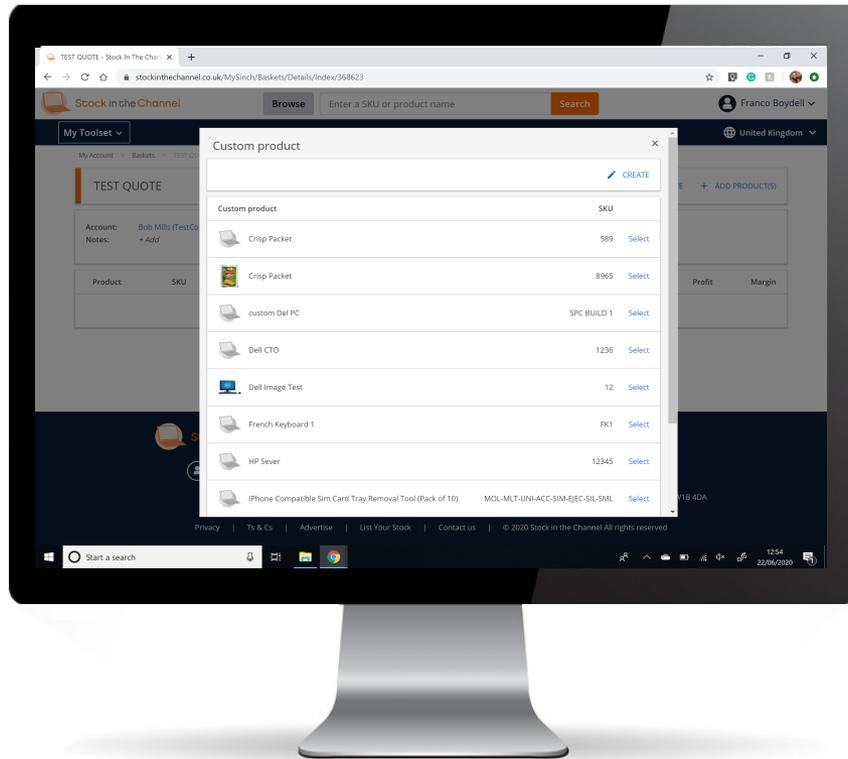
- 1 BUNDLES are pre-created groups of products that will appear as one line item within a Basket.

Example: You could create a Server Bundle with all the relevant Products included.

- 2 To create Bundles click My Toolset, then Order Process and select Bundles.

Full information on Bundles can be found in the [Settings & Configurations Guide](#).

Extra: Custom Products

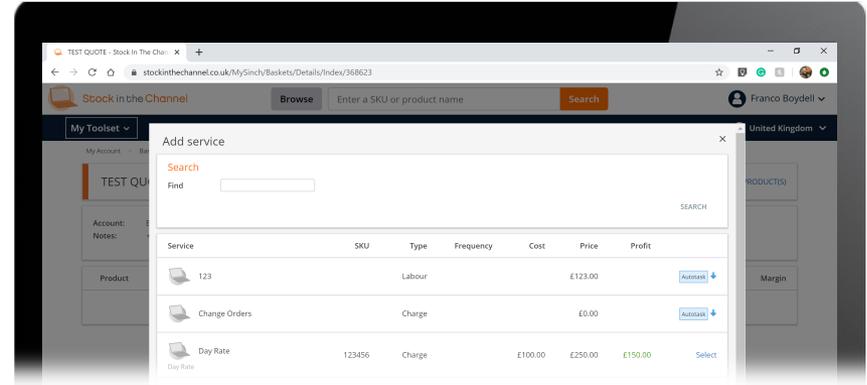
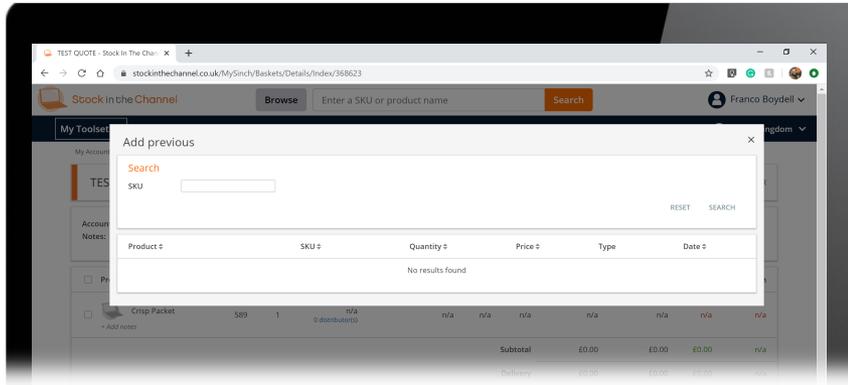


Custom Products are any individual items that you have purchased from suppliers outside of Stock In The Channel.

Example: These could be items you have purchased from Amazon, or Products Configured To Order.

NB. Any Custom Products must be allocated a Distributor, including Custom Distributors. These can be saved and stored to quickly access in the future.

Extras: Previous & Services



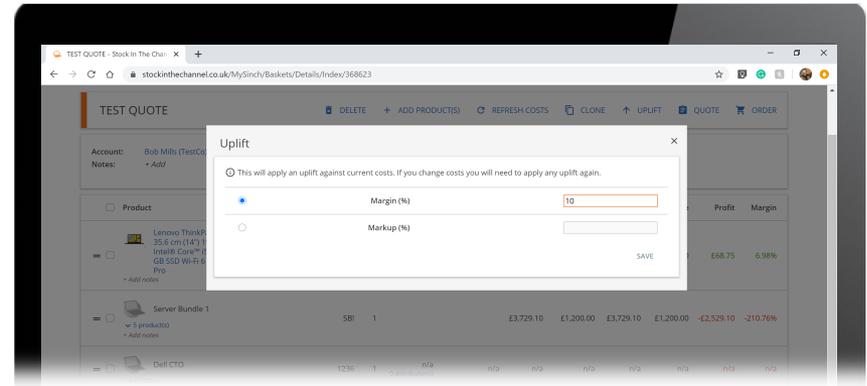
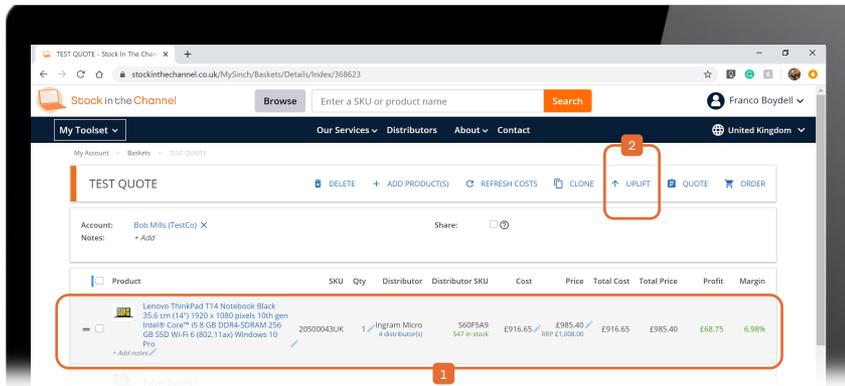
- 1 PREVIOUS products are items that you have previously Quoted or Sold to this specific customer, which makes creating repeated baskets easier.

This can also be done within an Account's page which was covered in [Module 2: Managing Accounts & Contacts](#).

- 2 SERVICES allow you to add additional fees such as installations, labour or management – alongside physical items.

Like Bundles, Services must be created in advance to drop in.

Step 5

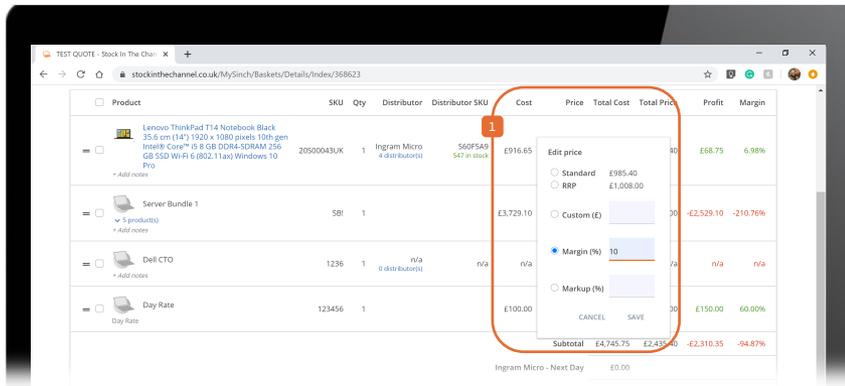


SINCH will automatically work out the most cost-effective way to fulfil a Basket, including pre-set Distributor delivery costs and surcharges.

- 1 You can override any detail by clicking the pencil, such as changing the Quantity, Distributor, or even editing the Product name.

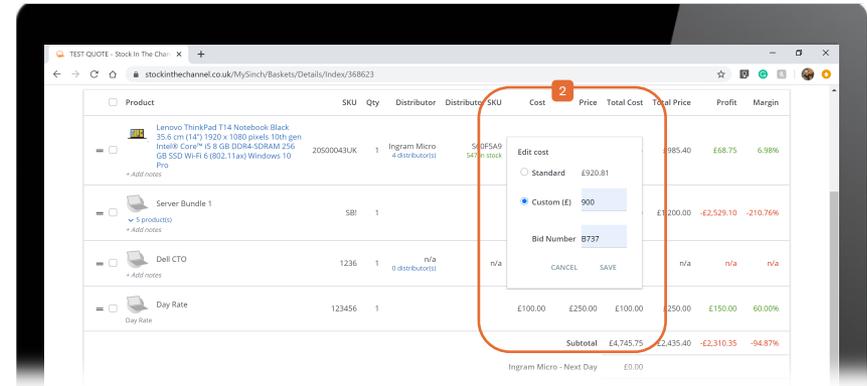
- 2 You can set a blanket Margin or Markup across the whole Basket of goods by using the Uplift button.

Step 6



- 1 You can edit the Cost of individual products if you have agreed special rates with your suppliers.

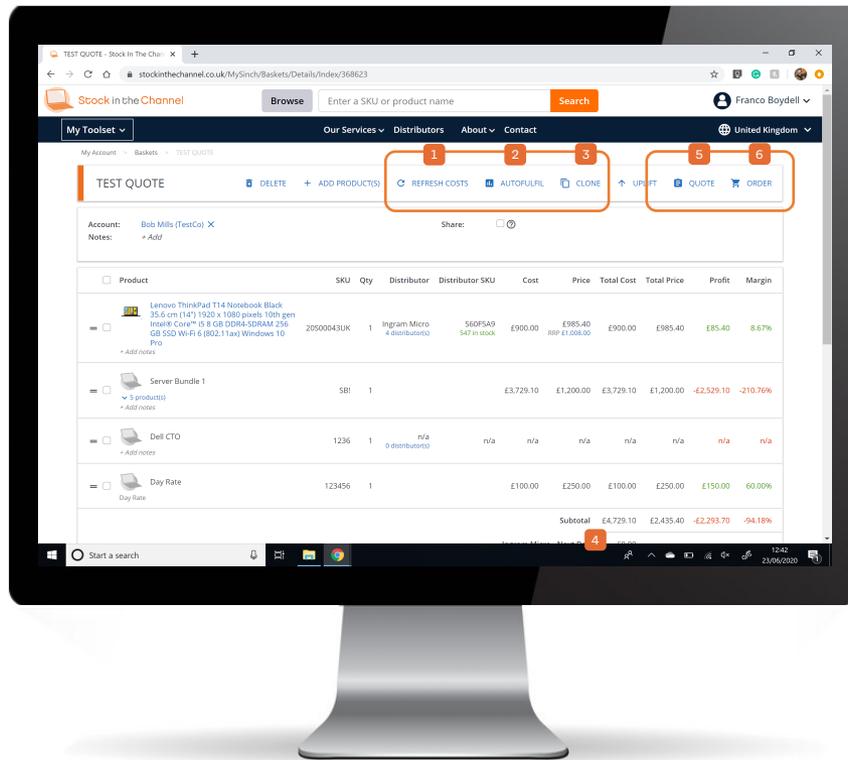
NB. Bid Numbers can be stored for reference when placing the Sales Order.



- 2 Sale Prices can also be edited at line items level.

These extensive editing features are here to help you build a bespoke Basket and Quote that is right for you and your customer.

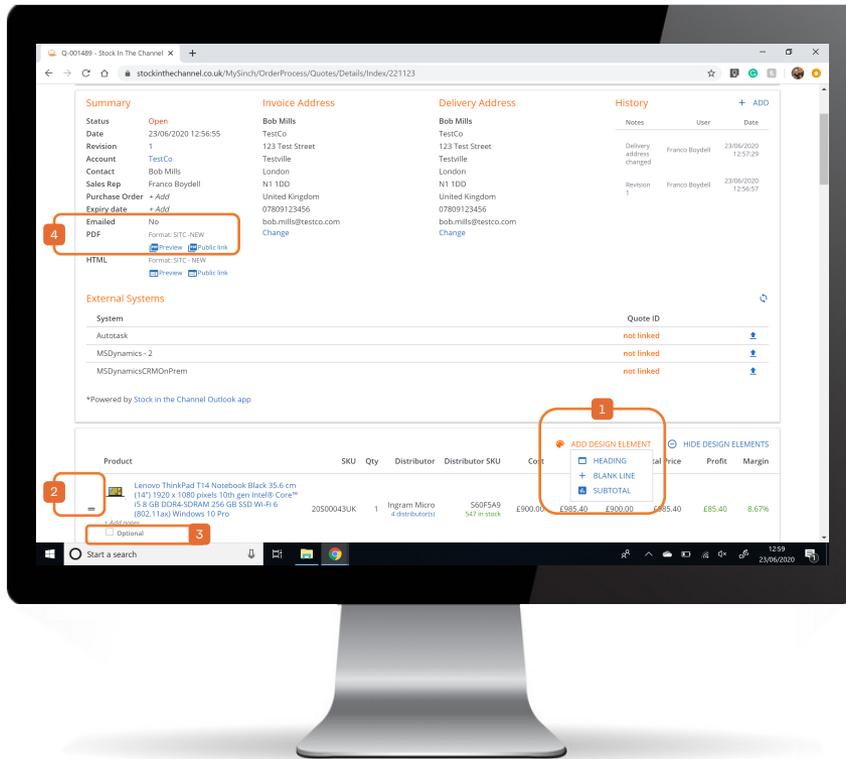
Step 7



Other Basket features include:

- 1 **REFRESH COSTS** – this updates the Basket Costs using the latest daily Price File.
- 2 **AUTOFULFIL** – only available if you have manually changed pricing – reverts costs back to the Price File.
- 3 **CLONE** – copies the full Basket.
- 4 Default delivery costs are taken from the Distributor’s Manage Pricing tab (covered in [Module 5: Setting Up Order Automation](#)). Delivery costs can also be edited by Basket, too.
- 5 You are now ready to create a Quote, or push this basket through straight away as
- 6 a Sales Order.

Step 8



Once in the Quote detail page, there are many design personalization options.

- 1 Add a **HEADING** to begin the quote with relevant written information, add a **BLANK LINE** to help space out the line items, or add a **SUBTOTAL** between sections to make your Quote as clear as possible.
- 2 You can drag and drop the line items to rearrange the product table.

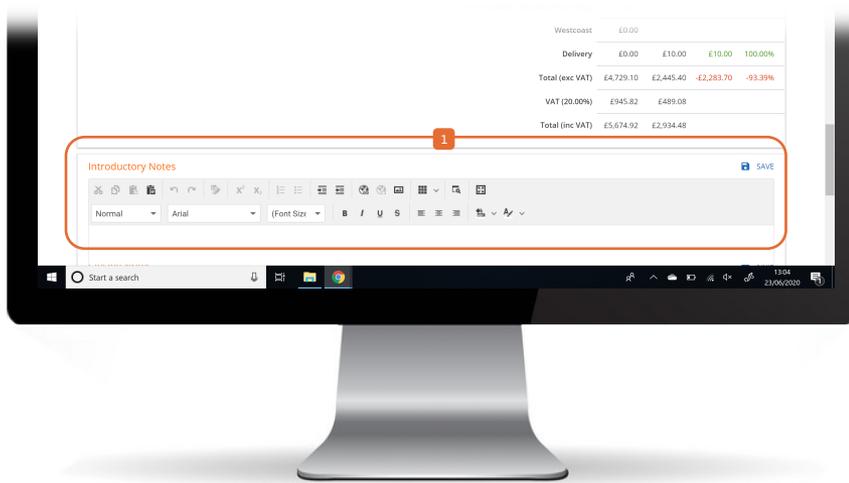
It is also possible to make line items

- 3 **Optional**, for your customer to review via the HTML format.

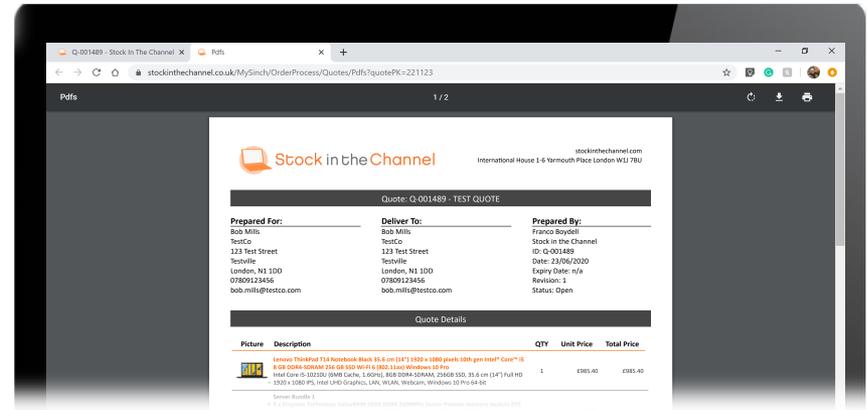
When you have completed your design,

- 4 click **Preview**.

Step 9



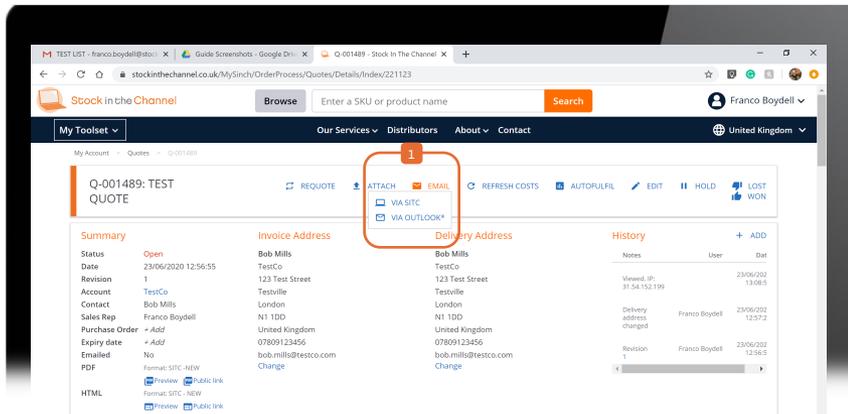
- 1 You can add Introductory and Closing Notes that will be included within the final Quote design.



Preview the PDF to ensure the the layout and information is correct.

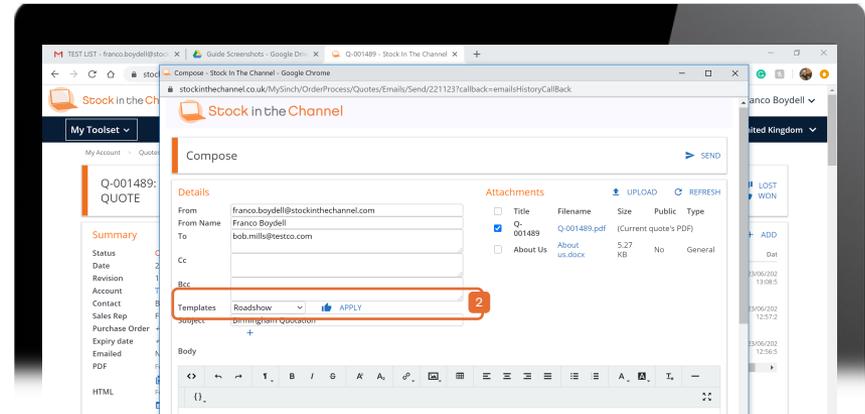
You can create multiple PDF Quote Templates, that can be made with the support of the SINCH team.

Step 10



- 1 You can email the Quote to your customer either via the Stock In The Channel email client or with a connected Outlook account.

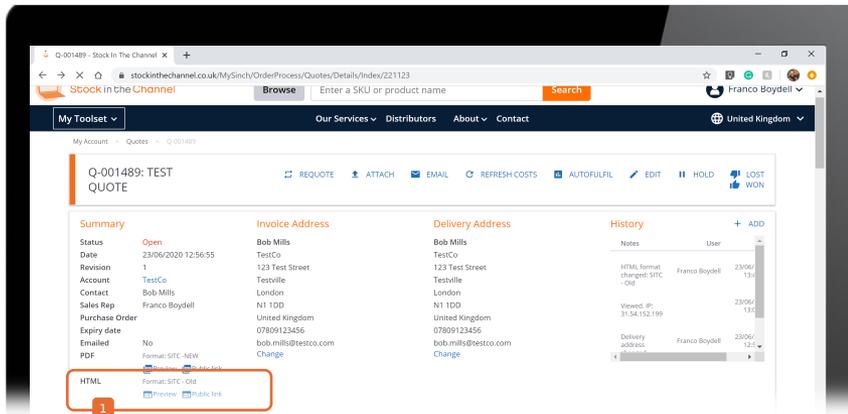
This will send to the selected email address for this Contact, but this can be edited while composing the email.



- 2 The SINCH email client automatically attaches the Quote, and you can also use email Templates to save time writing similar messages when quoting customers.

NB. All quoting templates must be set up separately, as covered in the [Settings & Configurations Guide](#).

Step 11

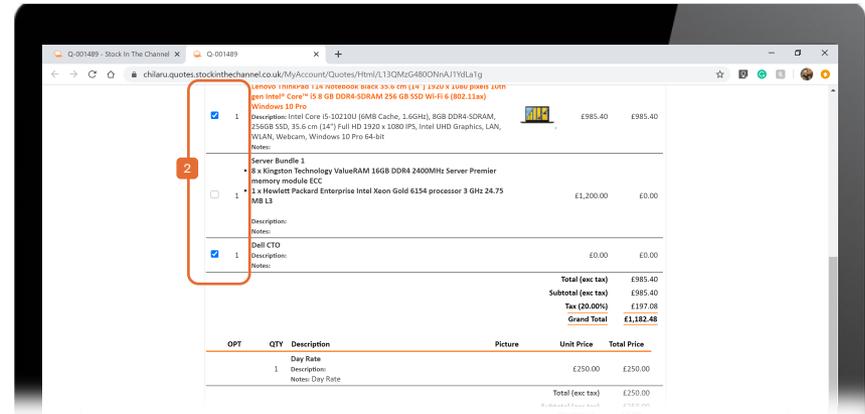


- 1 Choose the HTML Public Link to send an online version to your customer.

You can set notifications when customers opens the Quote

Your customer can then view the quote in

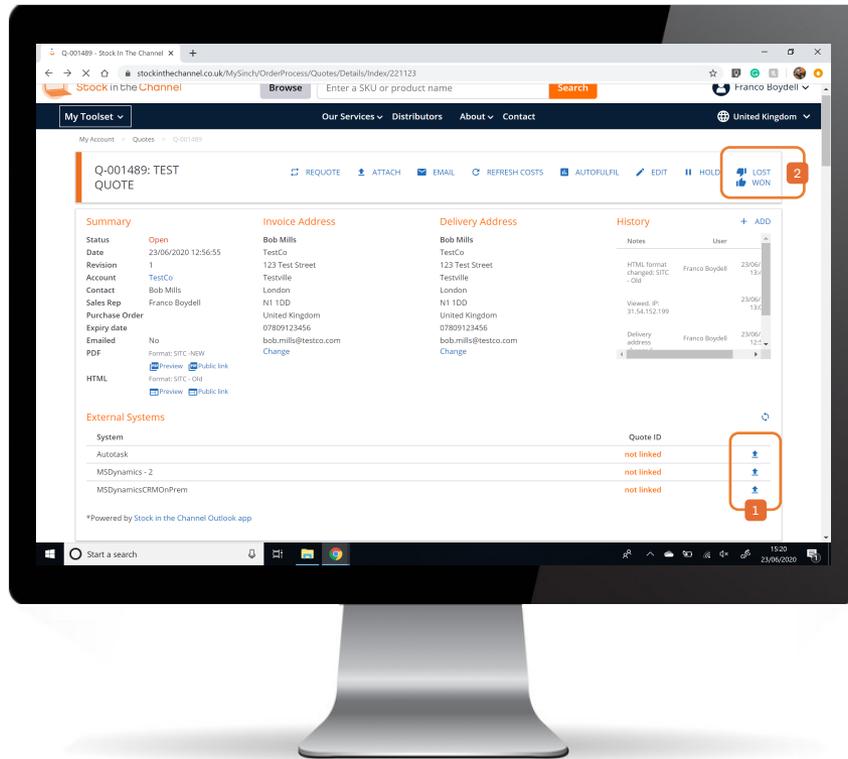
- 2 real-time and select / de-select line items that live update the Total Price.



Finally, they can Accept or Decline the quote, complete with a P.O Number and Comments.

When the customer accepts/rejects your quote you will receive an email notification.

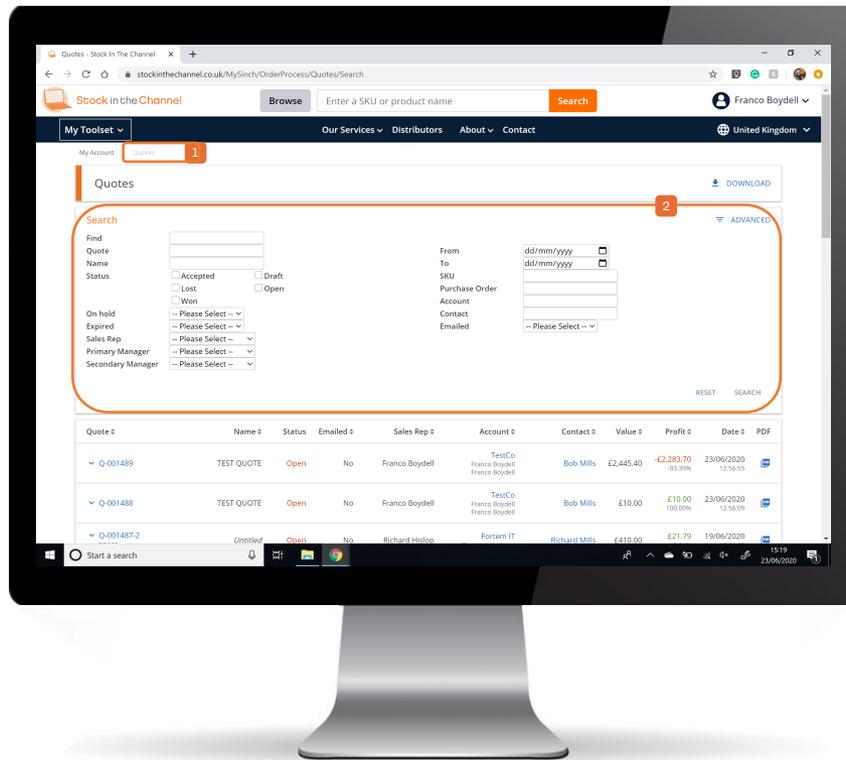
Step 12



- 1 You can push complete Quotes to any connected External Systems using the blue arrow.
- 2 Once you click Won, the Quote will appear as a Sales Order.

NB. For Modern Selling Customers, Quotes will be sent to select payment method before appearing in the live Collaborative Quoting tool on your Magento Account Dashboard.

Extra: Quotes Page



1 You can use the main Quotes Order page as a working page where you can filter and inspect all Quotes.

2 Use Advanced filtering to refine your search options. You can use the list to remind you who needs following up with, or any previous quotes. Further details are demonstrated on [Module 5: Setting up Order Automation](#).

Remember, Quotes for individual clients can be viewed on that Account's page.



Stock in the Channel

Thank you

You're now ready to move onto Module 5: Setting up Order Automation.

If you have any further questions, please email or call your Stock In The Channel Account Manager and they will be happy to provide any additional information.

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