# Mobile Quotes Documentation

## Settings



On first set-up, you will be asked for the following details:

**Username** – User ID for the device

**Forms Queue** – The forms queue for managing email processes

**Web Services URL** – The webservices URL required to connect to MACE

Press **Save** and then complete the additional settings:

**App ID** – This will be generated automatically

**Company** – The company to connect to in MACE

**Branch** – The branch to raise mobile quotes for

**User Profile** – The MACE user ID for this device

**Timeout (seconds)** – The delay that will occur before an error is displayed while trying to connect to MACE

Additional options include:

**Test Web Services** – Test the device connection to web services

**Test Mace Connection** – Test the device connection to MACE

**Wipe App** – Clear device data and restore to default settings

## Defaults
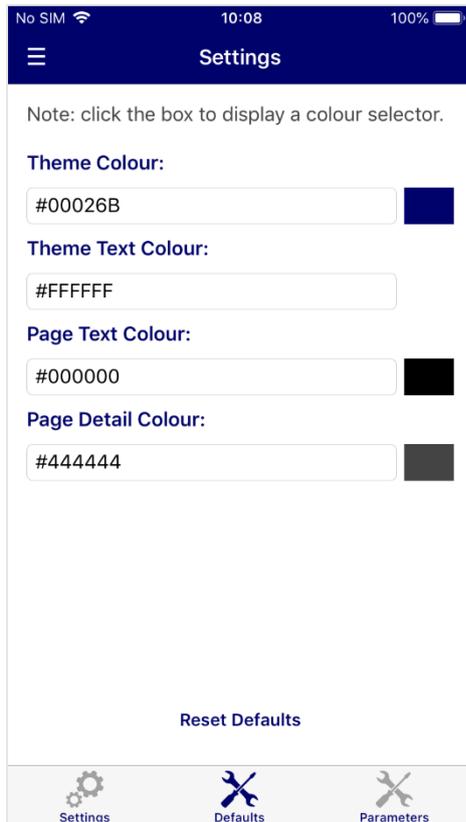
The Defaults page can be used to change application colours.

**Theme Colour** – Main colour for the application

**Theme Text Colour** – Used for text headings and titles

**Page Text Colour** – Application Background colour

**Page Detail Colour** – Used for page text

**Reset Defaults** – Set colours to the default application colour scheme

There are multiple colour options, with the ability to enter colour names such as 'red', or type in a colour's hexadecimal code. Colours on this screen will be saved automatically.

Alternatively, clicking the box next to the textbox will open a detailed colour selection screen. Click **Save** on this screen to save your colour selection.

## Parameters
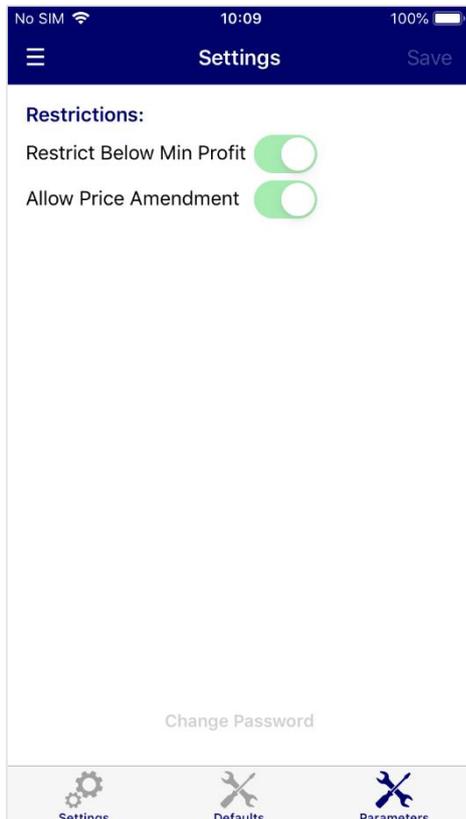
The settings in this page are application global.

**Restrict Below Min Profit** – Restrict the quote to minimum profit values

**Allow Price Amendment** – Allow user to change prices within the application

**Change Password** – Set a password to access this page and change parameter settings.

**Save** – Save any changes made to the parameters

## Navigation
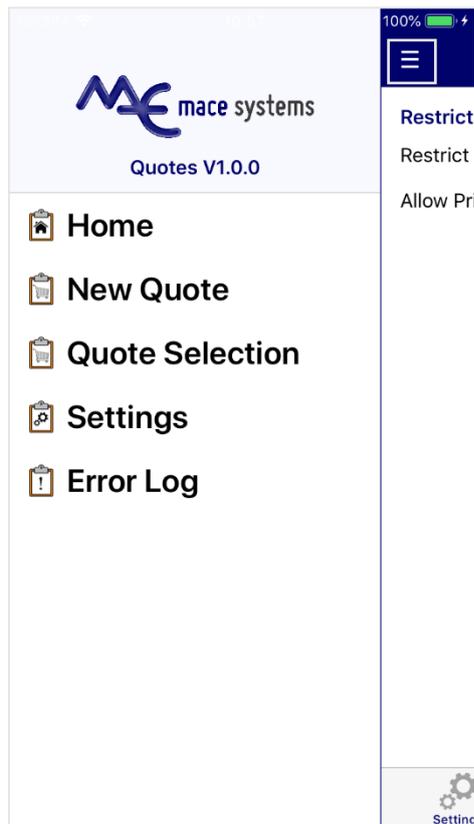


To navigate, either slide the screen to the right, or press the three dashed lines.

To select a page, tap on the required menu option.

To create a new mobile quote, tap **New Quote**.

To select an existing mobile quote, tap **Quote Selection**.

To change settings, select the **Settings** option.

To view past error messages, tap **Error Log**.

## Error Log
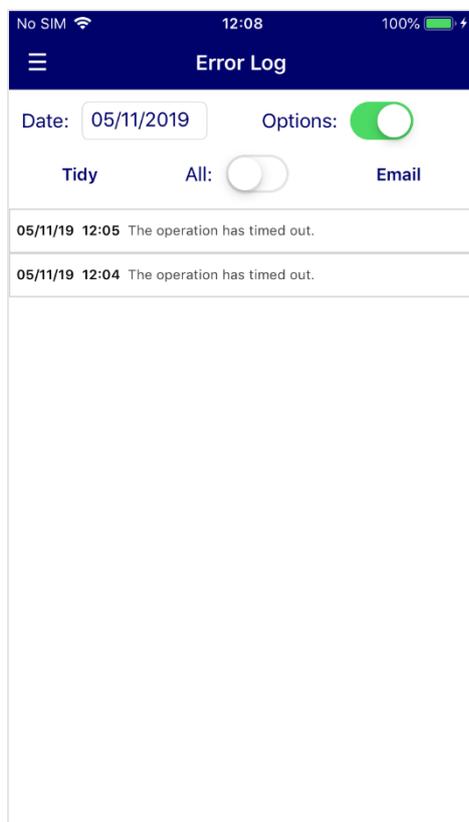


**Date** – List error messages on a set date

**Options** – Display options bar

**Tidy** – Clear error messages older than 60 days old

**All** – View all messages regardless of set date

**Email** – Email error log to MACE Support

## Quote Entry



**Quote** – The quote ID. This will be generated when the quote is saved

**Order Ref** – Customer quote reference

**Customer** – The customer ID. Customers can be selected by ID, name and sort key

**Salesman** – Salesman ID. This is populated automatically by the customer default but can be changed

**Valid Until** – Date until quote is invalid

**FRE** – Add a line of text to the quote

**Add** – Add a product to the quote. Products can be searched for by ID, name and sort key, with the default price pulled in automatically. Product quantity can be adjusted with the **-/+** buttons. Slide line to the right to delete the product or tap the product line to display the Product page

**Total** –Total value of quote

**Options** – Save the quote or delete the quote and return to the home screen

## Product Page



**Description** – Product description

**Quantity** – Adjust the line product quantity

**Price Per 1** - Price value for a single unit

**Discount** – Total product line discount

**Total** – Total goods value for this line

**Save** – Save the pricing amendments

The Product page also displays the current stock balances for the product.

## Mobile Quote Selection
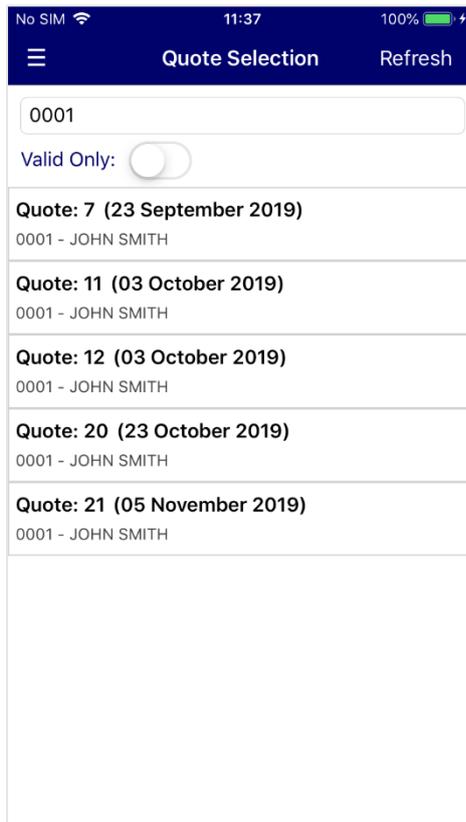


**Customer ID** - Search for quotes by customer ID

**Valid Only** – Only display quotes that have not expired

**Refresh** - Refresh the list of quotes

Tap a quote to display the quote details within the Quote Entry page

## Quote Entry – Existing Quotes
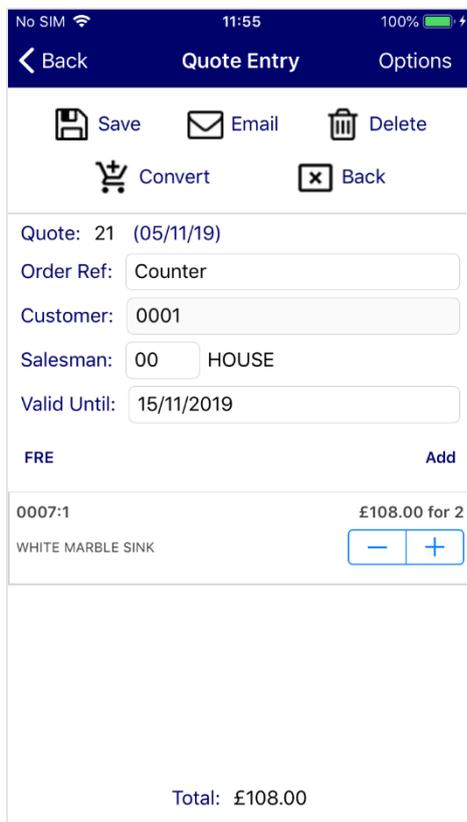


Existing quotes opened through Quote Selection will have additional features under the **Options** button.

**Save** – Save the changes to the quote

**Email** – Email the quote

**Delete** – Delete the quote

**Convert** – Convert the quote into a mobile Sales Order

**Back** – Return to the Home page

## Unlock Mobile Quotes

If a mobile quote is locked by the system but not currently in use on a device, the quote can be unlocked through the Unlock Mobile Quotes process. This can be found under the **Other | System Security** menu options.

At the Quote ID prompt, enter the mobile quote ID or press '#' to display a list of locked mobile quotes. When a quote is selected, hit 'Y' to unlock the quote.
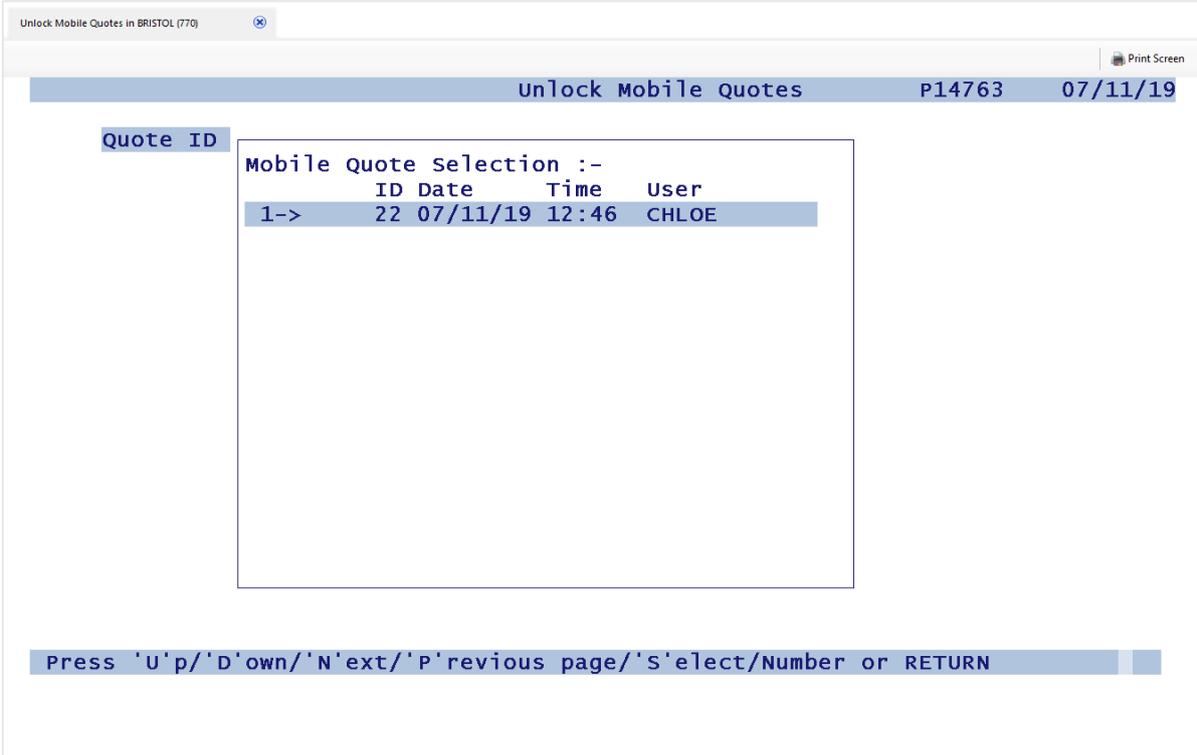
```
Unlock Mobile Quotes in BRISTOL (770)        ⊗

                                                                    🖶 Print Screen

                              Unlock Mobile Quotes        P14763    07/11/19


        Quote ID  ┌──────────────────────────────────────────────┐
                  │ Mobile Quote Selection :-                    │
                  │        ID Date      Time    User             │
                  │  1->   22 07/11/19 12:46   CHLOE             │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  │                                              │
                  └──────────────────────────────────────────────┘


     Press 'U'p/'D'own/'N'ext/'P'revious page/'S'elect/Number or RETURN
```
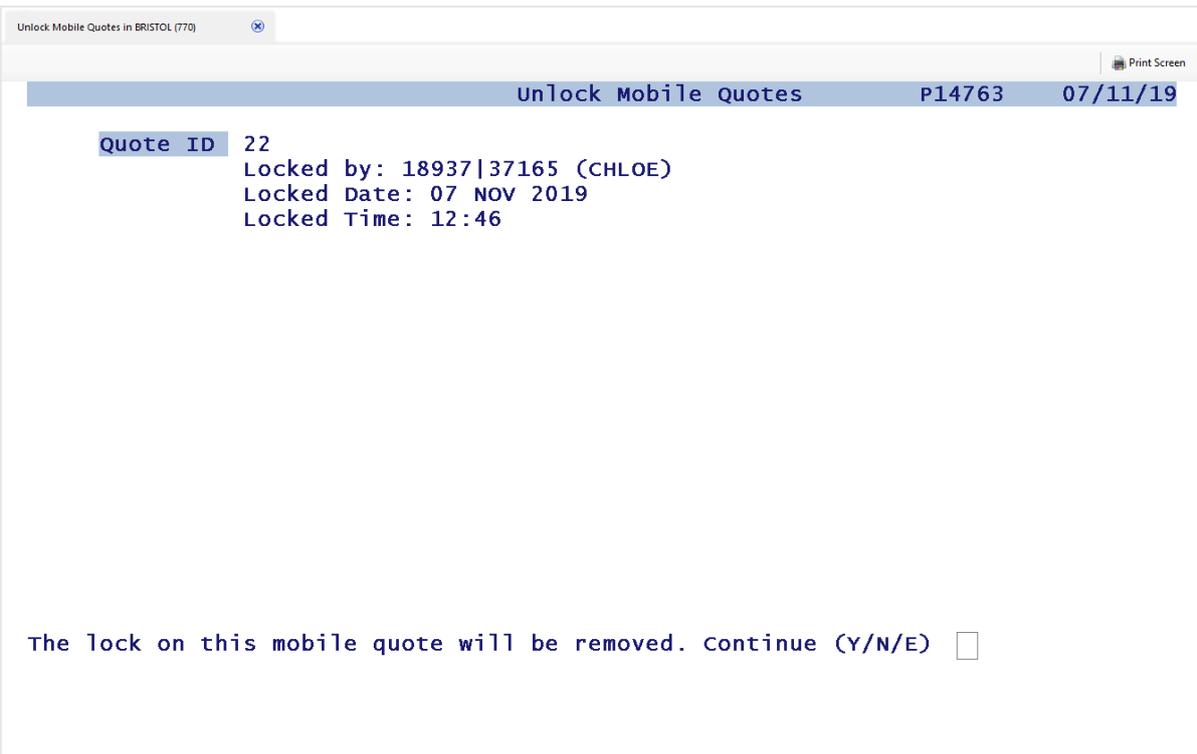
```
Unlock Mobile Quotes in BRISTOL (770)        ⊗

                                                                    🖶 Print Screen

                              Unlock Mobile Quotes        P14763    07/11/19


        Quote ID  22
                  Locked by: 18937|37165 (CHLOE)
                  Locked Date: 07 NOV 2019
                  Locked Time: 12:46











     The lock on this mobile quote will be removed. Continue (Y/N/E)  ☐
```

## Mobile Quote Enquiry

Network Client has a new graphical enquiry screen listing live and historical mobile quotes. The quote can then be selected to open a new form with additional quote information displayed.