Standard Operating Procedure
Weekly Pricing via Quotes for Customers

Dole & Bailey, Inc.
Implementation Date: 03/29/23

PURPOSE: Produce weekly price quote sheets for customers.

RESPONSIBILITIES: ISS/OSS Department

If you would like to send weekly pricing to a contracted customer, you will complete a 2 step process in Provisions. First, you must complete a quote for them with all of the items they are interested in. You will create the quote in the quote entry screen and click the Accept button when you are finished.

Next you will complete a customer price list file. Go to Sales, Sales Order Processing Menu (cont), Quote Menu, and then click on Price List Maintenance/ Print.
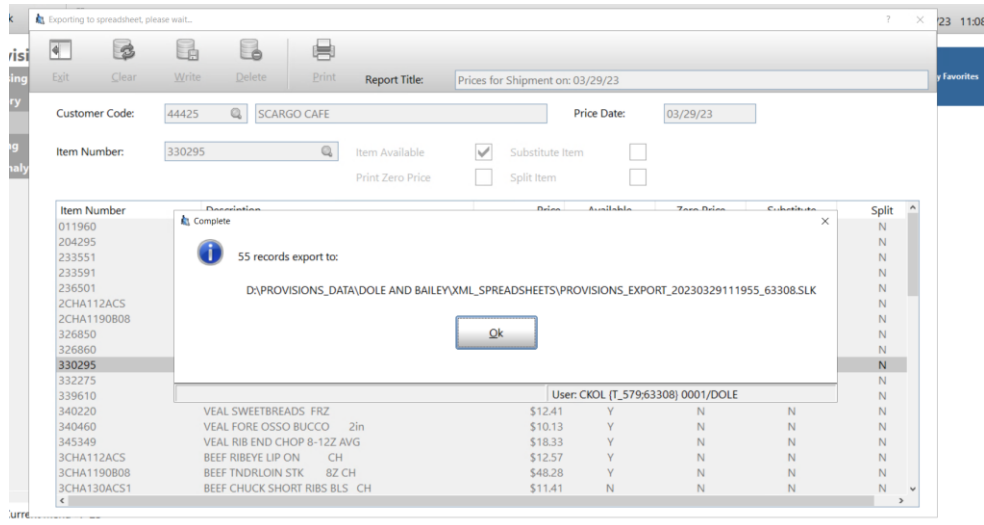
At this point you can either type in your customer code if you know it or search for your customer and hit F2 to search for them the same way you would in basic order entry. Now you will enter each of the item numbers from your quote in the item number box below. Again, you can directly type in your item number or search with the F2 function key to add your items. After you type in your item number or select it from the menu click the Write button to add it to your price list.

Provisions will automatically sort your line items by item number. If you want them sorted by commodity click on the item description. Once you are complete you do not need to save anything you can click Exit and your list will live here in this screen.

On Friday after IT gives sales the green light that prices have flipped for the week this price list you have created will automatically be updated for you in the system. All you need to do is return to this screen, hold down the shift key and then press F7. You will get a pop-up like the one below. Click OK.

Your updated pricing data is now transferred to an Open Office screen within Provisions. This is not Excel. All you need to do from here is copy and paste your data into a blank excel document, format it how you would like, and you can send it off to your clients!