



Vessel Config Quick Reference – How to Generate a Quote Document

Generate Quote Document Instructions – Vessel Config allows users to create a proposal document with the list of parts generated from the Vessel Config tool. The user has the option to add a company logo and add additional discounts to the Bill of Materials which can be given to the customer.

1. Begin building your configuration by entering the **Engine Application Information**.
2. Select the appropriate **Controls and Steering information**.
3. After the required fields are completed – the **Bill of Materials** will be generated.

*Note: All questions with a **RED Asterisk (*)** are required and must be answered to generate a valid Bill of Material*

4. Select **Save Configuration**
5. Select the **Create Quote** Tab.

Item #	Item Name	Config Qty	Order Qty	Price	Total Price	Comments (for reference only)
89325A03	SWITCH/KEY	1	1	\$80.00	\$80.00	
89437T11	WARRANTY ASH-1PT	1	1	\$193.62	\$193.62	

6. Enter the **Customer Information** the quote is being generated for.

Customer Information

Company Name: _____
 First Name: Joe
 Last Name: Customer
 Address: 456 First Street
 Address 2: _____
 City: Anytown
 State: WI
 Zip: 99999
 Country: United States
 Phone: 555-555-5555
 Email: Joecustomer@yahoo.com

Prepared By

Company Name: Jack Dealer
 Name: Parts Guy @ Jack Dealer
 Address: 123 Main Street
 City: Anytown
 State: WI
 Zip: 99999
 Phone: 123-456-7890
 Email: dealer@dealer.com

Show Discounting Options



7. Select **Show Discounting Options** to add a discount for the customer per line or to the total amount of the quote (Optional).
8. Select the **Format** you which to generate the quote in (.PDF, .CSV., or DOCX)
9. Select **Print Proposal**.

State: WI Phone: 123-456-7890
 Zip: 99999 Email: JoeCustomer@Dealer.com
 Country: United States
 Phone: 555-555-5555
 Email: JoeCustomer@yahoo.com

Show Discounting Options

Item #	Item Name	Config Qty	Order Qty	Price	Discount	Discount Type	Total Price	Comments (for reference only)
893353A03	SWITCH KIT-KEY	1	1	\$80.00	20	Percent Off	\$64.00	
896537T11	HARNES ASY-11FT	1	1	\$193.62	20	Percent Off	\$154.90	
8M0030550	RC OB TRIM-CHROME	1	1	\$400.00			\$400.00	
8M0082533	CABLE T/5 G2 10FT	2	2	\$41.83			\$83.66	
8M0088973	BULKHEAD KIT-DUAL	1	1	\$70.32			\$70.32	
8M0053475	HOSE KIT-HYD 3 FT	1	1	\$100.33			\$100.33	
8M0053482	HOSE KIT-HYD 12FT	1	1	\$135.55			\$135.55	
8M0054993	KIT-STR CYL-150HP	1	1	\$440.05			\$440.05	
8M0050099	HELM KIT-TILT	1	1	\$611.58			\$611.58	
Totals							\$2,115.11	

Change Log
 Comments

Discount Type
 Order Discount (\$) Amount Off \$0.00

Total (List) \$2,115.11
 Total Discount \$54.72
 Total (Net) \$2,060.39

Jack Dealer
 123 Main Street
 Anytown, WI 99999
 123-456-7890
 Prepared By: Parts Guy @ Jack Dealer

Date: 28-03-2018
 Quote #: CPQ-810

Customer
 Joe Customer
 456 First Street
 Anytown, WI 99999
 555-555-5555

Mercury Item Number	Item Name	Qty	MSRP	Discount	Discount Type	Discount Amount	Total Price
893353A03	SWITCH KIT-KEY	1	\$80.00	20.00	Percent Off	\$16.00	\$64.00
896537T11	HARNES ASY-11FT	1	\$193.62	20.00	Percent Off	\$38.72	\$154.90
8M0030550	RC OB TRIM-CHROME	1	\$400.00			\$0.00	\$400.00
8M0082533	CABLE T/5 G2 10FT	2	\$41.83			\$0.00	\$83.66
8M0088973	BULKHEAD KIT-DUAL	1	\$70.32			\$0.00	\$70.32
8M0053475	HOSE KIT-HYD 3 FT	1	\$100.33			\$0.00	\$100.33
8M0053482	HOSE KIT-HYD 12FT	1	\$135.55			\$0.00	\$135.55
8M0054993	KIT-STR CYL-150HP	1	\$440.05			\$0.00	\$440.05
8M0050099	HELM KIT-TILT	1	\$611.58			\$0.00	\$611.58

Total List	\$2,115.11
Order Discount	\$0.00
Total Discount	\$54.72
Total Due	\$2,060.39