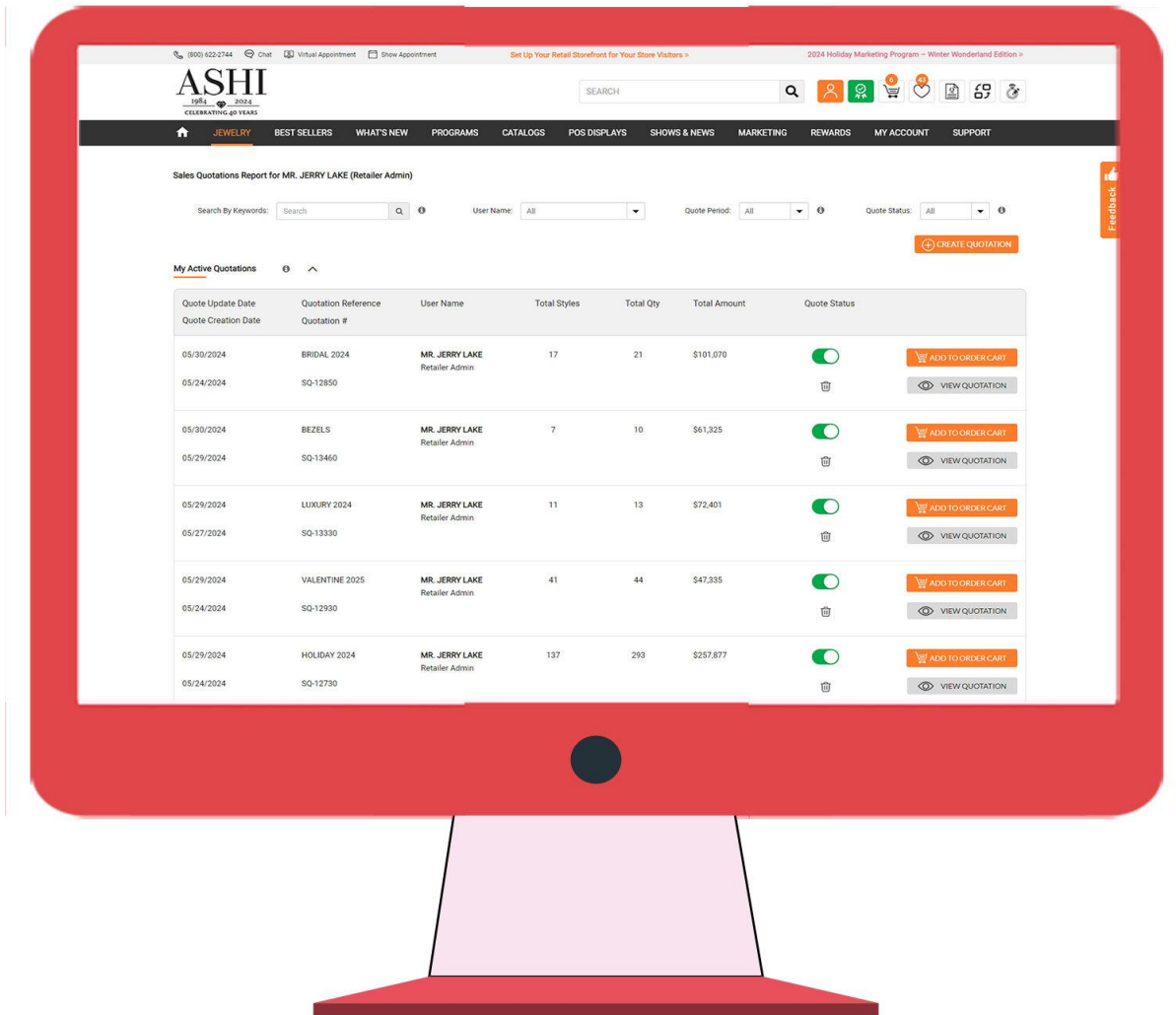




# ASHI B2B - SALES QUOTATION MODULE



## HELP MANUAL

Powered by:



**The Sales Quotation Module on the ASHI B2B Website allows effortless creation and management of Sales Quotations.**

The Sales Quotation feature fosters collaboration and communication, enabling users to seamlessly create, share, review, and adjust quotations as necessary.

Now you can easily add styles to Sales Quotations through the Product List or Product Detail Page. You can also find existing Sales Quotations in the Sales Quotation Module, available in the My Account section of the ASHI B2B website. Please follow the easy steps below to create, edit, delete, and email sales quotations.

Sales Quotations Report for MR. JERRY LAKE (Admin)

Search By Keywords:   ⓘ    User Name:  ▾    Quote Period:  ▾ ⓘ    Quote Status:  ▾ ⓘ

**My Active Quotations** ⓘ ^

Quote Update Date Quote Creation Date	Quotation Reference Quotation #	User Name	Total Qty	Total Amount	Quote Status	
08/09/2024 05/31/2024	BRIDAL RINGS SQ-13680	MR. JERRY LAKE Retailer Admin	28	\$48,935	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/>
06/21/2024 05/24/2024	SILVER JWRLRY SQ-12910	MR. JERRY LAKE Retailer Admin	162	\$136,619	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/>
05/31/2024 05/24/2024	BRIDAL 2024 SQ-12850	MR. JERRY LAKE Retailer Admin	32	\$96,870	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/>

To create a new Sales Quotation, you need to log in to the ASHI B2B Website. Click on the link below to go to the ASHI B2B Website. [www.AshiDiamonds.com/LoginPage.aspx](http://www.AshiDiamonds.com/LoginPage.aspx)

## PRODUCT LIST PAGE

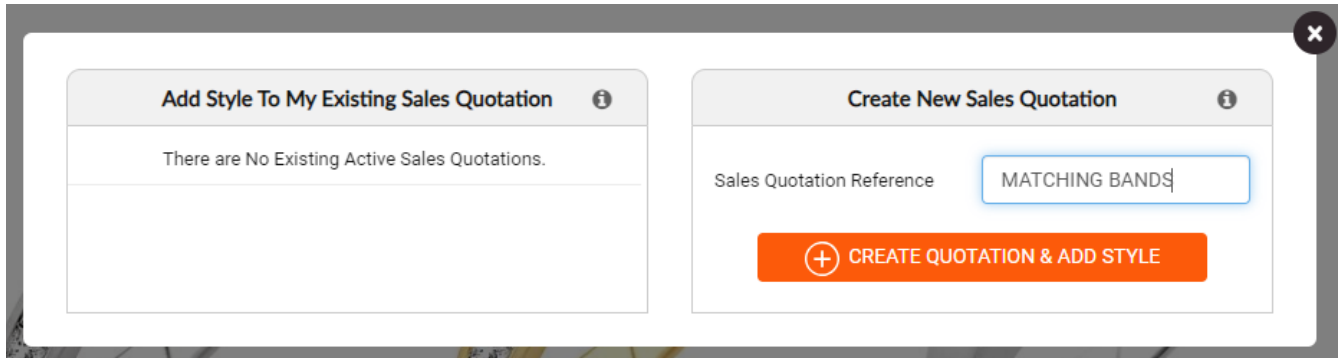
1. Navigate to the Product List Page.

2. On the Product List Page, you will find the “Sales Quotation” icon positioned between the Wish List and Product Detail icons for all Styles.

Style #	Price	Description
25820FRW-LE-3.00	\$8,910	3 Ctw Nine Stone Princess Cut Diamond Engagement Ring in 14K White Gold
25820FRW-LE-3.00	\$8,910	3 Ctw Nine Stone Princess Cut Diamond Engagement Ring in 14K Yellow Gold
30940FCW-2.00	\$6,650	2 Ctw Three Stone Round Cut Diamond Ring in 14K White Gold
30940FC-2.00	\$6,650	2 Ctw Three Stone Round Cut Diamond Ring in 14K Yellow and White Gold

### Case 1: When there are no Existing Active Sales Quotations

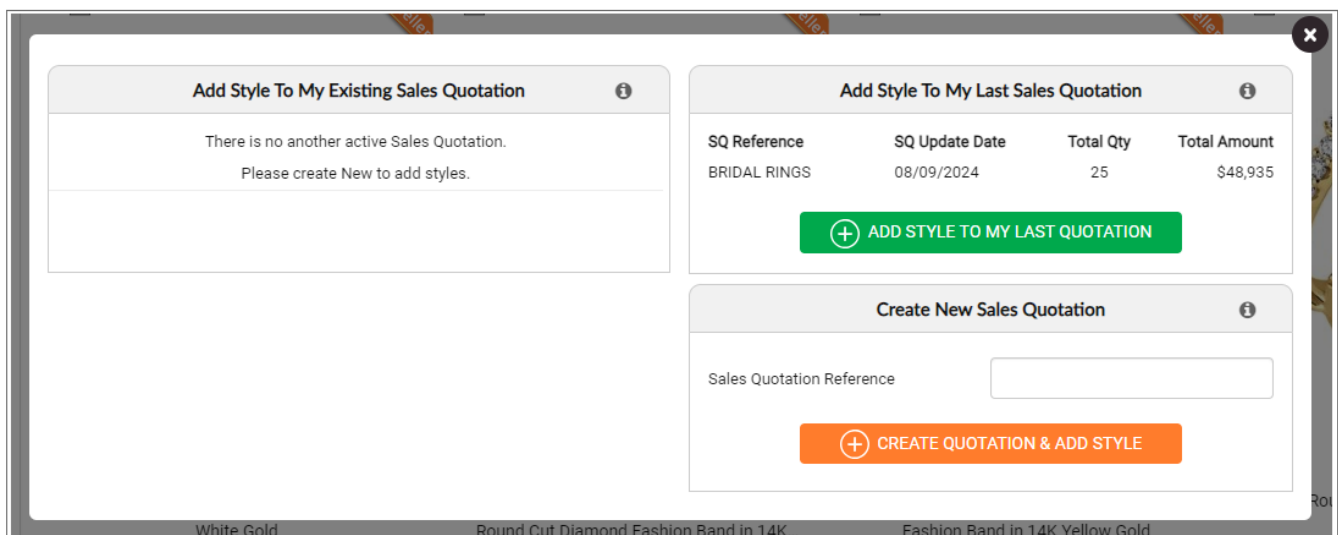
- On clicking the **Sales Quotation** icon on the desired style, a pop-up will appear where you can add that style to a sales quotation. If you do not have any existing Sales Quotations then you can create a new sales quotation and style will be added to it.



- The Sales Quotation Reference can be up to 15 characters in length and accepts alphanumeric characters (with or without spaces) as well as certain special characters.

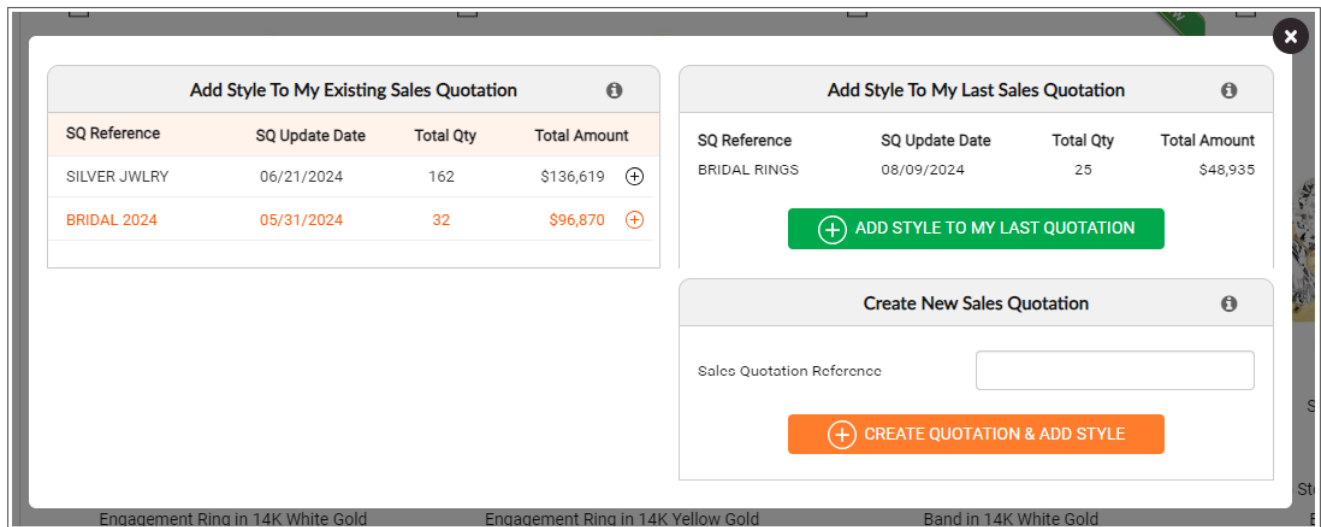
### Case 2: When there is at least one Existing Active Sales Quotation

- Once you create a new Sales Quotation and click the Sales Quotation icon again then your last created Sales Quotation will start appearing in the popup.

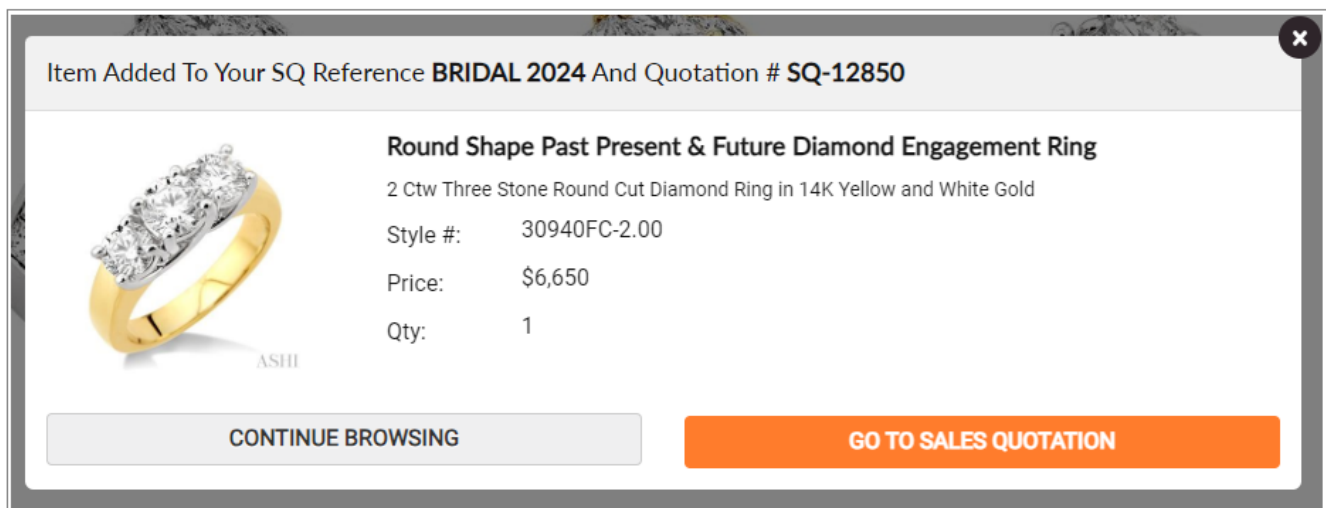


### Case 3: When there are two or more Existing Active Sales Quotations

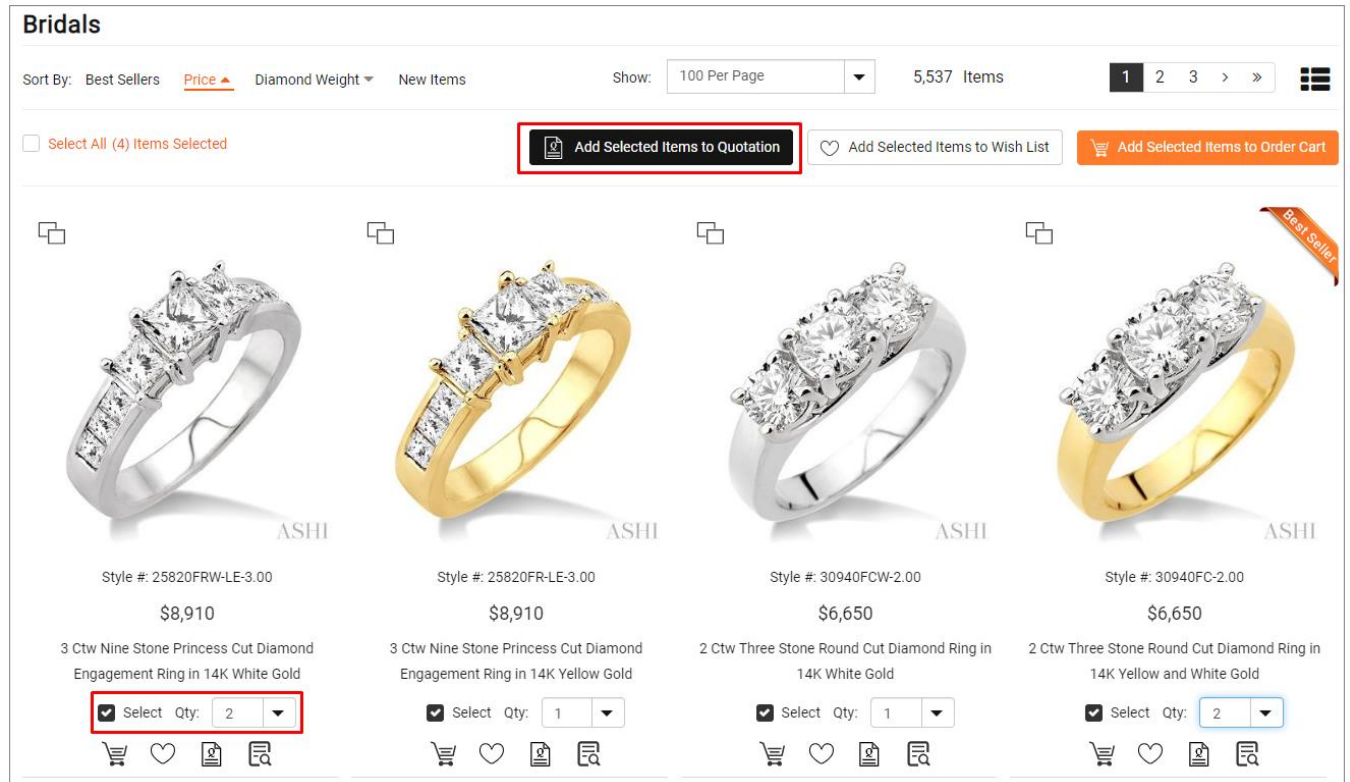
- If you have 2 or more Sales Quotations, then your last updated Sales Quotation will appear in the top right box with the heading **“Add Style To My Last Sales Quotation”** and the rest of these Sales Quotations will appear in the left box with the heading **“Add Style To My Existing Sales Quotation”**.
- You can add any style to your last Sales Quotation or any of your existing Sales Quotations by clicking on it.
- The **“Add Style To My Existing Sales Quotation”** section will display your latest 14 active Sales Quotations.



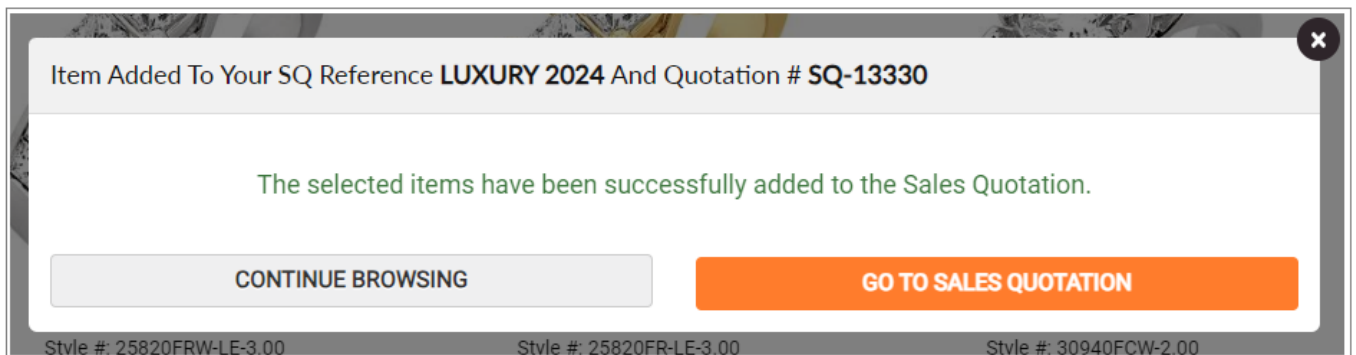
- When you create a new Sales Quotation or add any of the style(s) to an existing Sales Quotation, a confirmation popup will appear along with the Style details that have been added. This confirmation popup will automatically close within a few seconds. If you click the **“Go To Sales Quotation”** button then it will take you to the Sales Quotation to which the style(s) were added.



10. **Alternatively**, you can select **multiple styles** to add to any of your Sales Quotations from the Product List page by clicking on individual styles, or you can check the **“Select All”** checkbox to add all the styles at once.
11. You can select 2 or more styles along with the quantity (Qty) that you want to add to your Sales Quotation, and then click on the **“Add Selected Items to Quotation”** button on the top. The same popup will appear and you can add selected styles to any existing or new Sales Quotation.



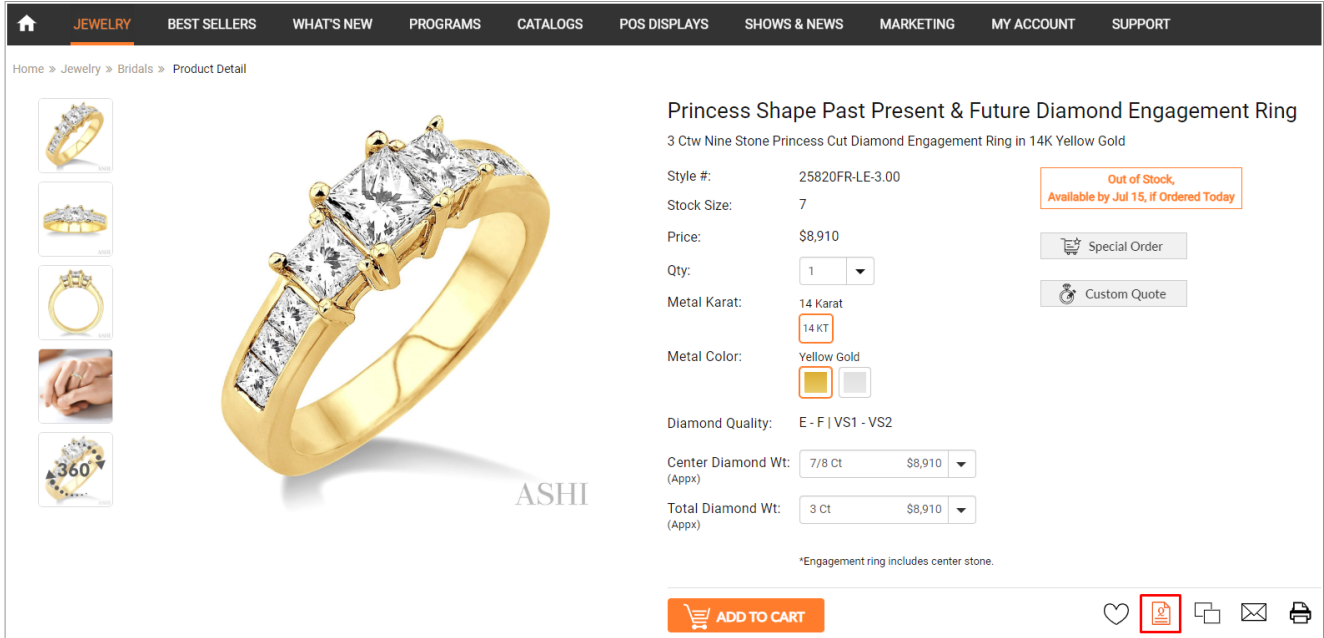
12. Upon successful addition of styles into the Sales Quotation, a confirmation popup will appear which will automatically close after a few seconds.





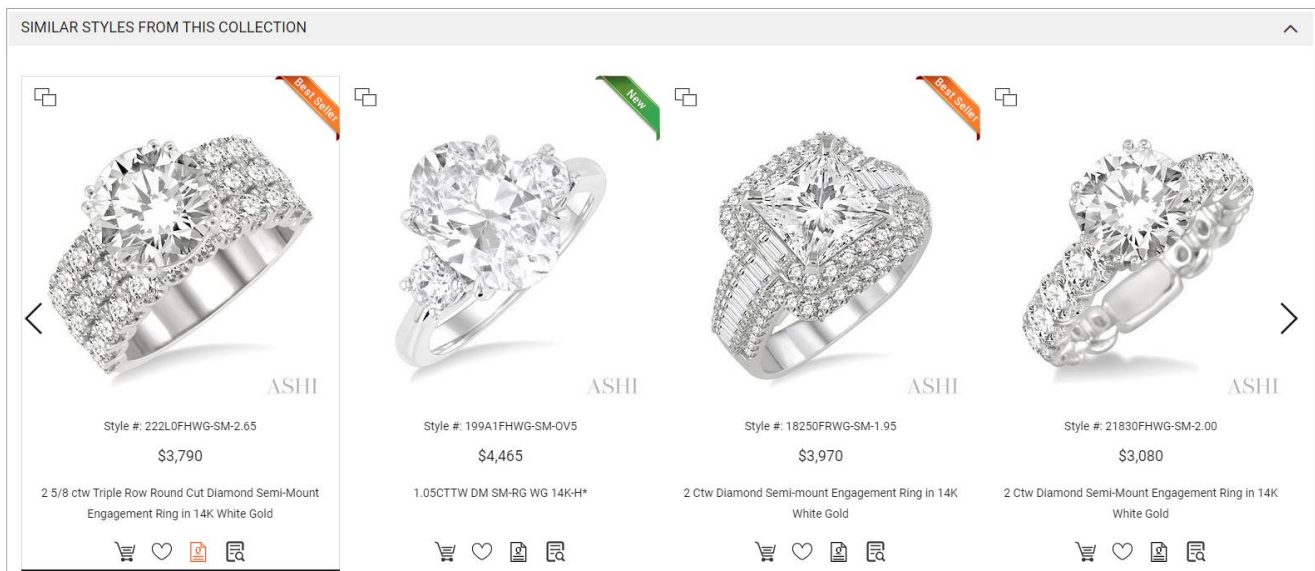
## PRODUCT DETAIL PAGE

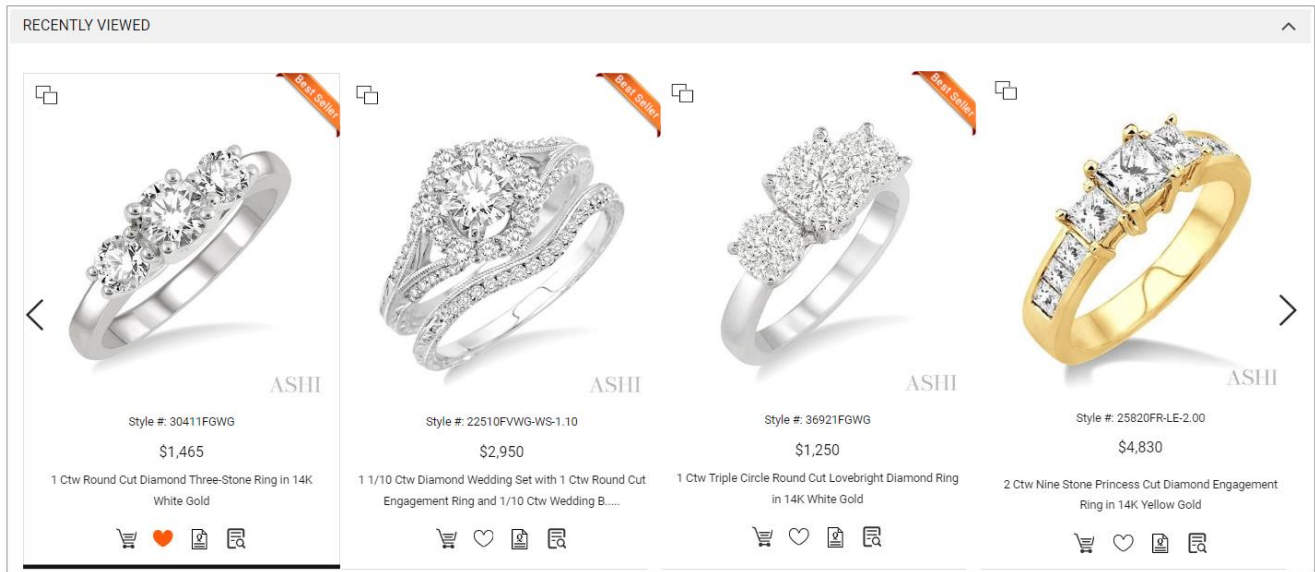
13. You can also add a style in the Sales Quotation on the **Product Detail page**. On the Product Detail Page, you will find the **“Sales Quotation”** icon positioned between the Wish List and Compare icons.



14. The **“Sales Quotation”** functionality on the Product Detail page is similar to the Product List Page.

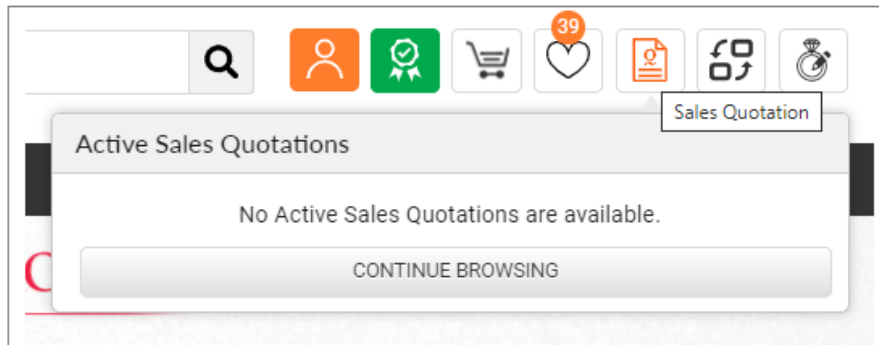
15. On the Product Detail page, as you scroll down, the Sales Quotation icon is also available on **SIMILAR STYLES FROM THIS COLLECTION, RELATED STYLES FROM THIS COLLECTION, and RECENTLY VIEWED** styles.



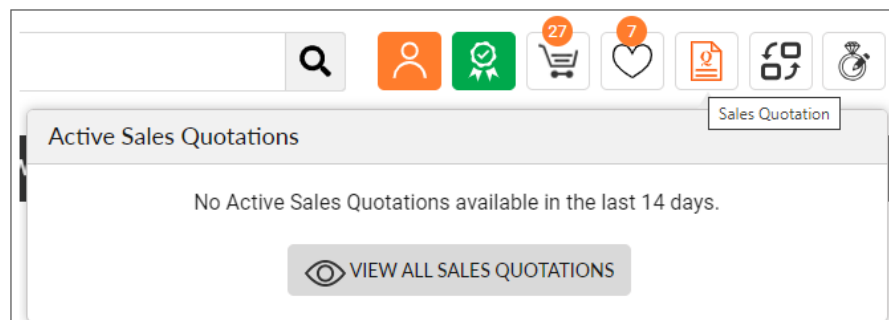


## SALES QUOTATION SUMMARY

- Sales Quotation Icon is available on the Website Header, next to the Order Cart Icon, which shows the Sales Quotation Summary on mouse hover.
- If no Active Sales Quotations are available then this Summary will display the message **“No Active Sales Quotations are available.”**



- If you or other users have not created or updated any Sales Quotations in the last 14 days, then this Summary section will display the message **“No Active Sales Quotations are available in the last 14 days.”**





19. If you or other users have created any Sales Quotations, then this Summary section will display the **latest six active Sales Quotations**.
20. When you hover over a specific Sales Quotation Detail, it becomes highlighted and on clicking it, you will be directed to the **Specific Sales Quotation Detail page**, providing a comprehensive view of all details associated with that quotation.
21. On clicking the **“VIEW ALL SALES QUOTATIONS”** button, you will be directed to the Sales Quotations Report page.

Active Sales Quotations

SQ Reference	SQ Update Date	User Name	Total Qty	Total Amount
HOLIDAY 2024	08/09/2024	MR. JERRY LAKE	295	\$260,438
LUXURY 2024	08/09/2024	MR. JERRY LAKE	43	\$104,393
PETITE 2024	08/09/2024	MR. JERRY LAKE	50	\$60,194
TOP SELLERS	08/09/2024	MR. JERRY LAKE	172	\$141,714
ENGAGEMENT RING	08/09/2024	MR. JERRY LAKE	40	\$96,759
BEZELS	08/09/2024	MR. JERRY LAKE	11	\$62,140

VIEW ALL SALES QUOTATIONS

## SALES QUOTATION REPORT PAGE

22. On the Sales Quotations Report page, you will find a list of all the Active and Past Sales Quotations. Also, depending on your User Role and access level, you may see Active and Past Sales Quotations of other Users as well.
23. At the top of this page, you will find Search and Filter Options through which you can search specific Sales Quotations by Keywords, User Name, Quote Period, or Quote Status.
24. On the Sales Quotations Report page, you can also create a new Sales Quotation by clicking the **Create Quotation** button. Your newly created Sales Quotation will appear at the top of the Sales Quotation Report page and you can add Style(s) to this newly created Sales Quotation from the Product List page, Product Detail page, and Active Sales Quotations.
25. When there is no style in a Sales Quotation, the **“ADD TO ORDER CART”** button will not be visible. Once you add style(s) to that sales quotation, the **“ADD TO ORDER CART”** button will appear.

Sales Quotations Report for MR. JERRY LAKE (Admin)

Search By Keywords:   ⓘ      User Name:       Quote Period:  ⓘ      Quote Status:  ⓘ

**My Active Quotations** ⓘ ^

Quote Update Date	Quotation Reference	User Name	Total Qty	Total Amount	Quote Status	
Quote Creation Date	Quotation #					
08/09/2024	HOLIDAY 2024	MR. JERRY LAKE Retailer Admin	295	\$260,438	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/>
05/24/2024	SQ-12730				<input type="checkbox"/>	<input type="button" value="VIEW QUOTATION"/>

26. The Sales Quotations Report page is divided into 4 sections. Please note, depending on your User Role and access level, you may see Active and Past Sales Quotations of other Users as well.
  - **My Active Quotations** – Displays all your active quotations created by you.
  - **Other Active Quotations**– Displays active quotations from other users including Sales Quotations from ASHI Salesman and ASHI Customer Service Team.
  - **My Past Quotations**– Displays all your inactive quotations. Inactive quotations will not show the **“ADD TO ORDER CART”** button.
  - **Other Past Quotations**– Displays inactive quotations from other users including Sales Quotations from ASHI Salesman and ASHI Customer Service Team. Inactive quotations will not show the **“ADD TO ORDER CART”** button.

27. You can view the Sales Quotation Details by clicking the **“VIEW QUOTATION”** Button for any of the Sales Quotations.

28. You can also add the entire Quotation Style(s) to the Order Cart from any Active Sales Quotation by clicking the **“ADD TO ORDER CART”** Button.

Sales Quotations Report for MR. JERRY LAKE (Admin)

Search By Keywords:   ⓘ    User Name:  ▾    Quote Period:  ▾ ⓘ    Quote Status:  ▾ ⓘ

**My Active Quotations** ⓘ ^

Quote Update Date Quote Creation Date	Quotation Reference Quotation #	User Name	Total Qty	Total Amount	Quote Status	
08/09/2024 05/31/2024	BRIDAL RINGS SQ-13680	MR. JERRY LAKE Retailer Admin	28	\$48,935	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/>
06/21/2024 05/24/2024	SILVER JWRLRY SQ-12910	MR. JERRY LAKE Retailer Admin	162	\$136,619	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/>
05/31/2024 05/24/2024	BRIDAL 2024 SQ-12850	MR. JERRY LAKE Retailer Admin	32	\$96,870	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/>

29. Also, you can change the Quote Status of the Sales Quotations listed on this page. Please note that Sales Quotations become inactive after 180 days of inactivity.

30. If you change the “Quote Status” of an Active Sales Quotation to Inactive then that Sales Quotation will move to the Past Quotations. If you change the status from Inactive to Active, the Sales Quotation will move to Active Quotations.

31. You can delete any quotation from the Sales Quotations Report page by clicking on the Delete icon.

Sales Quotations Report for MR. JERRY LAKE (Admin)

Search By Keywords:   ⓘ    User Name:  ▾    Quote Period:  ▾ ⓘ    Quote Status:  ▾ ⓘ

**My Active Quotations** ⓘ ^

Quote Update Date Quote Creation Date	Quotation Reference Quotation #	User Name	Total Qty	Total Amount	Quote Status	
08/09/2024 05/24/2024	HOLIDAY 2024 SQ-12730	MR. JERRY LAKE Retailer Admin	295	\$260,438	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/> <input type="button" value="VIEW QUOTATION"/> <input type="button" value="Delete"/>

## SALES QUOTATION DETAIL PAGE

32. On clicking the “VIEW QUOTATION” Button available against any of the Active Sales Quotations on the Sales Quotations Report page, you will see the quotation details including all the styles of that specific Sales Quotation.

Sales Quotations Report for MR. JERRY LAKE (Admin)

Search By Keywords:   ⓘ    User Name:     Quote Period:  ⓘ    Quote Status:  ⓘ

**My Active Quotations** ⓘ ^

Quote Update Date	Quotation Reference	User Name	Total Qty	Total Amount	Quote Status	
Quote Creation Date	Quotation #					
08/09/2024	HOLIDAY 2024	MR. JERRY LAKE Retailer Admin	295	\$260,438	<input checked="" type="checkbox"/>	<input type="button" value="ADD TO ORDER CART"/>
05/24/2024	SQ-12730				<input type="checkbox"/>	<input type="button" value="VIEW QUOTATION"/>

33. Sales Quotation Detail page includes Quotation Reference, Quotation #, Quote Update Date, Quote Creation Date, User Name, and Quote Status (which you can change). You can edit the Quotation Reference of only your Active Sales Quotation and not other user’s Sales Quotations whereas you can change the Quote Status of all the Sales Quotations visible to you.

**SEARCH & ADD STYLES**

- ASHI Document
- My Frequently Ordered
- My Top Ordered
- Flyer Program
- ASHI Catalog
- Product Categories
- Style Id

**QUOTATIONS LIST**

**MY ACTIVE QUOTATIONS**

- > TOP SELLERS
- > ENGAGEMENT RING
- > SILVER JWLRY

[Show More](#)

**OTHER ACTIVE QUOTATIONS**

- > PRODUCTEMAIL251
- > PRODUCTEMAIL243
- > PRODUCTEMAIL255
- > 1

**MY PAST QUOTATIONS**

- > PETITE 2024

**Sales Quotation**

Please add styles to your Sales Quotation. ✉️ 🖨️ 🗑️

Quotation Ref.:

Quote Update Date: 08/10/2024    User Name: MR. JERRY LAKE (Admin)

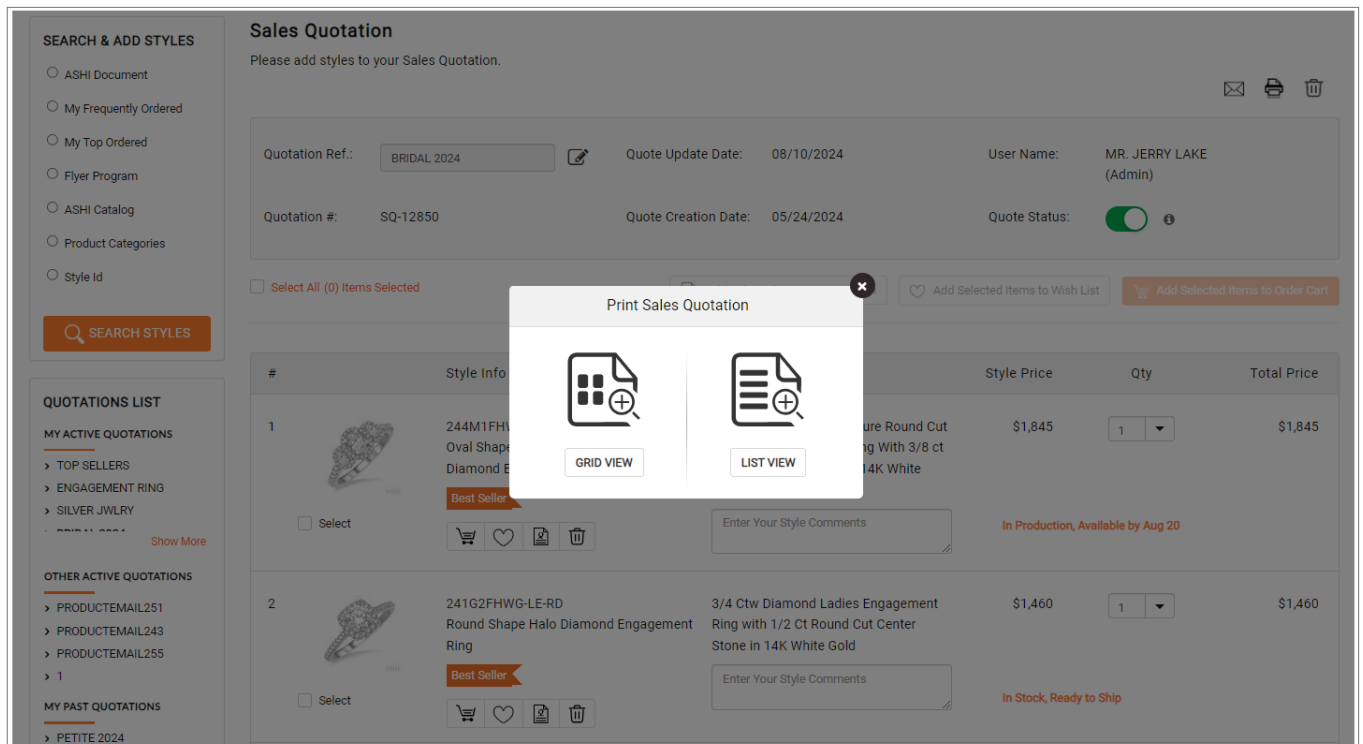
Quotation #: SQ-12850    Quote Creation Date: 05/24/2024    Quote Status:  ⓘ

Select All (0) Items Selected           

#	Style Info	Style Price	Qty	Total Price	
1	<p>244M1FHWG-LE Oval Shape Past Present &amp; Future Halo Diamond Engagement Ring</p> <p><input type="checkbox"/> Select</p> <p style="text-align: center;"><b>Best Seller</b></p> <p style="text-align: center;"><input type="button" value="Add"/> <input type="button" value="Heart"/> <input type="button" value="Print"/> <input type="button" value="Trash"/></p>	1 Ctw Past, Present & Future Round Cut Diamond Engagement Ring With 3/8 ct Oval Cut Center Stone in 14K White Gold	\$1,845	<input type="text" value="1"/> ▼	\$1,845
<p><input type="text" value="Enter Your Style Comments"/></p> <p style="text-align: right; color: red;">In Production, Available by Aug 20</p>					
2	<p>241G2FHWG-LE-RD Round Shape Halo Diamond Engagement Ring</p> <p><input type="checkbox"/> Select</p> <p style="text-align: center;"><b>Best Seller</b></p> <p style="text-align: center;"><input type="button" value="Add"/> <input type="button" value="Heart"/> <input type="button" value="Print"/> <input type="button" value="Trash"/></p>	3/4 Ctw Diamond Ladies Engagement Ring with 1/2 Ct Round Cut Center Stone in 14K White Gold	\$1,460	<input type="text" value="1"/> ▼	\$1,460
<p><input type="text" value="Enter Your Style Comments"/></p> <p style="text-align: right; color: red;">In Stock, Ready to Ship</p>					

Page 12 of 28

34. Similar to the Product List Page, you can add styles to the Order Cart, Wish List, or any other Sales Quotations of yours. You can add individual styles or multiple/all styles by using the Select All functionality. You can also add comments against individual styles or for the entire Sales Quotation.
35. In the Left Pane, you have the option to **SEARCH & ADD STYLES** similar to the Quick Reorder page.
36. The bottom part of the Left Pane shows the list of all the Sales Quotations and you can click and view any of the Sales Quotations. From the **QUOTATIONS LIST**, you can toggle between quotations. Clicking on any of the quotations will take you to the Sales Quotation Detail page of the selected quotation.
37. The Sales Quotations Detail page also has the Print option at the top right. Clicking the **“Print”** button opens up the Print Sales Quotation pop-up.











38. You can print your Sales Quotation in **“Grid View”** or in **“List View”**.

39. The Grid View print page displays the Sales Quotation Report in a 4 x 4 grid, along with all the details, excluding the inventory message.

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### SALES QUOTATION REPORT

Company Name: <b>CARTER JEWELERS (JACKSON, MS)</b>		Quotation Ref.: <b>BRIDAL 2024</b>		Quote Update Date: <b>08/12/2024</b>		User Name: <b>MR. JERRY LAKE (Admin)</b>	
Quotation #: <b>SQ-12850</b>		Quote Creation Date: <b>05/24/2024</b>		Quote Status: <b>Active</b>			

 ASHI	 ASHI	 ASHI	 ASHI
<b>244M1FHWG-LE</b> Price: \$1,845 1 Ctw Past, Present & Future Round Cut Diamond Engagement Ring With 3/8 ct Oval Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>241G2FHWG-LE-RD</b> Price: \$1,460 3/4 Ctw Diamond Ladies Engagement Ring with 1/2 Ct Round Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>253L3FHWG-LE</b> Price: \$1,550 5/8 Ctw Emerald and Baguette Diamond Engagement Ring with 1/2 Ct Emerald cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>22563FVWG-LE</b> Price: \$1,115 5/8 Ctw Diamond Engagement Ring with 1/3 Ct Round Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>
 ASHI	 ASHI	 ASHI	 ASHI
<b>23712FHWG-LE-OV</b> Price: \$1,685	<b>245M1FHWG-LE</b> Price: \$1,825	<b>244G4FHWG-LE</b> Price: \$780	<b>262F2FVWG-LE</b> Price: \$1,745













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## SALES QUOTATION REPORT

Company Name: <b>CARTER JEWELERS (JACKSON, MS)</b>		Quote Update Date: <b>08/12/2024</b>		User Name: <b>MR. JERRY LAKE (Admin)</b>	
Quotation Ref.: <b>BRIDAL 2024</b>		Quote Creation Date: <b>05/24/2024</b>		Quote Status: <b>Active</b>	
Quotation #: <b>SQ-12850</b>					


			
ASHI	ASHI	ASHI	ASHI
<b>244M1FHWG-LE</b> <b>Price: \$1,845</b> 1 Ctw Past, Present & Future Round Cut Diamond Engagement Ring With 3/8 ct Oval Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>241G2FHWG-LE-RD</b> <b>Price: \$1,460</b> 3/4 Ctw Diamond Ladies Engagement Ring with 1/2 Ct Round Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>253L3FHWG-LE</b> <b>Price: \$1,550</b> 5/8 Ctw Emerald and Baguette Diamond Engagement Ring with 1/2 Ct Emerald cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>22563FVWG-LE</b> <b>Price: \$1,115</b> 5/8 Ctw Diamond Engagement Ring with 1/3 Ct Round Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>
			
ASHI	ASHI	ASHI	ASHI
<b>23712FHWG-LE-OV</b> <b>Price: \$1,685</b> 7/8 ctw Pear & Round Cut Diamond Engagement Ring With 1/2 ct Oval Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>245M1FHWG-LE</b> <b>Price: \$1,825</b> 1 Ctw Past, Present & Future Round Cut Diamond Engagement Ring With 3/8 ct Pear Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>244G4FHWG-LE</b> <b>Price: \$780</b> 3/8 Ctw Emerald Shape Engagement Ring with 1/4 Ct Emerald Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>262F2FVWG-LE</b> <b>Price: \$1,745</b> 3/4 Ctw Intertwined Shank Round Cut Diamond Ladies Engagement Ring with 3/8 Ct Pear Shaped Center Stone in 14K White Gold <b>QUOT QTY: 1</b>

40. The List View print page displays the Sales Quotation Report in list view, with styles appearing one below the other, along with all the details including, the inventory message.






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### SALES QUOTATION REPORT

Company Name: <b>CARTER JEWELERS (JACKSON, MS)</b>		Quote Update Date: <b>08/12/2024</b>		User Name: <b>MR. JERRY LAKE (Admin)</b>	
Quotation Ref.: <b>BRIDAL 2024</b>		Quote Creation Date: <b>05/24/2024</b>		Quote Status: <b>Active</b>	





#	Style Info	Style Price	Qty	Total Price
1	 <p><b>244M1FHWG-LE</b>                      Oval Shape Past Present &amp; Future Halo Diamond Engagement Ring</p> <p style="font-size: small;">1 Ctw Past, Present &amp; Future Round Cut Diamond Engagement Ring With 3/8 ct Oval Cut Center Stone in 14K White Gold</p> <p style="font-size: x-small; color: orange;">Best Seller</p>	<b>\$1,845</b>	<b>1</b>	<b>\$1,845</b>
In Production, Available by Sep 19				
2	 <p><b>241G2FHWG-LE-RD</b>                      Round Shape Halo Diamond Engagement Ring</p> <p style="font-size: small;">3/4 Ctw Diamond Ladies Engagement Ring with 1/2 Ct Round Cut Center Stone in 14K White Gold</p> <p style="font-size: x-small; color: orange;">Best Seller</p>	<b>\$1,460</b>	<b>1</b>	<b>\$1,460</b>
In Stock, Ready to Ship				
3	 <p><b>253L3FHWG-LE</b>                      Emerald Shape Diamond Engagement Ring</p> <p style="font-size: small;">5/8 Ctw Emerald and Baguette Diamond Engagement Ring with 1/2 Ct Emerald cut Center Stone in 14K White Gold</p> <p style="font-size: x-small; color: orange;">Best Seller</p>	<b>\$1,550</b>	<b>1</b>	<b>\$1,550</b>
1 In Stock, Call Office to Confirm				



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## SALES QUOTATION REPORT

Company Name:	CARTER JEWELERS (JACKSON, MS)				
Quotation Ref.:	BRIDAL 2024	Quote Update Date:	08/12/2024	User Name:	MR. JERRY LAKE (Admin)
Quotation #:	SQ-12850	Quote Creation Date:	05/24/2024	Quote Status:	Active

#	Style Info	Style Price	Qty	Total Price	
1	 <b>244M1FHWG-LE</b> Oval Shape Past Present & Future Halo Diamond Engagement Ring Best Seller	1 Ctw Past, Present & Future Round Cut Diamond Engagement Ring With 3/8 ct Oval Cut Center Stone in 14K White Gold	\$1,845	1	\$1,845
			In Production, Available by Sep 19		
2	 <b>241G2FHWG-LE-RD</b> Round Shape Halo Diamond Engagement Ring Best Seller	3/4 Ctw Diamond Ladies Engagement Ring with 1/2 Ct Round Cut Center Stone in 14K White Gold	\$1,460	1	\$1,460
			In Stock, Ready to Ship		
3	 <b>253L3FHWG-LE</b> Emerald Shape Diamond Engagement Ring Best Seller	5/8 Ctw Emerald and Baguette Diamond Engagement Ring with 1/2 Ct Emerald cut Center Stone in 14K White Gold	\$1,550	1	\$1,550
			1 In Stock, Call Office to Confirm		
4	 <b>22563FVWG-LE</b> Round Shape Halo Diamond Engagement Ring Best Seller	5/8 Ctw Diamond Engagement Ring with 1/3 Ct Round Cut Center Stone in 14K White Gold	\$1,115	1	\$1,115
			1 In Stock, Call Office to Confirm		





- 41. For **Sales Associate User**, the Print page displays the Retail Price for all styles, along with the **Company Logo** and **Store Information**.
- 42. The Grid View print page displays the Sales Quotation Report in a 4x4 grid, along with the Company Logo, Store Information, and all details, excluding the inventory message.

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**JEWELRY MARKETING, INC., 711 HIGH STREET**  
 JACKSON, MS 39201 | ☎ 601-354-3549 CARTERDIAMONDS.COM

PRINT

### SALES QUOTATION REPORT

Company Name: <b>CARTER JEWELERS (JACKSON, MS)</b>		Quote Update Date: <b>09/09/2024</b>		User Name: <b>Ranu Trivedi (Sales Associate)</b>	
Quotation Ref.: <b>RINGS 2024</b>		Quote Creation Date: <b>08/23/2024</b>		Quote Status: <b>Active</b>	
Quotation #: <b>SQ-16590</b>					









 ASHI	 ASHI	 ASHI	 ASHI
<b>33340FHYG-3.00</b> <b>Price: \$18,940</b> 3 Ctw 5 Stone Round Cut Diamond Wedding Band in 14K Yellow Gold <b>QUOT QTY: 1</b>	<b>260M2FGYW-LE-OV</b> <b>Price: \$2,180</b> 3/4 ctw Oval Shape Halo Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and White <b>QUOT QTY: 1</b>	<b>30410FGWG-1.50</b> <b>Price: \$6,540</b> 1 1/2 Ctw Round Cut Diamond Three-Stone Ring in 14K White Gold <b>QUOT QTY: 1</b>	<b>258M3FGYW-LE-OV</b> <b>Price: \$1,670</b> 1/2 ctw Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and White Gold <b>QUOT QTY: 1</b>




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### SALES QUOTATION REPORT


Company Name:	<b>CARTER JEWELERS (JACKSON, MS)</b>			User Name:	<b>Ranu Trivedi (Sales Associate)</b>
Quotation Ref.:	<b>RINGS 2024</b>	Quote Update Date:	<b>09/09/2024</b>	Quote Status:	<b>Active</b>
Quotation #:	<b>SQ-16590</b>	Quote Creation Date:	<b>08/23/2024</b>		

			
ASHI	ASHI	ASHI	ASHI
<b>33340FHYG-3.00</b> <b>Price: \$18,940</b> 3 Ctw 5 Stone Round Cut Diamond Wedding Band in 14K Yellow Gold <b>QUOT QTY: 1</b>	<b>260M2FGYW-LE-OV</b> <b>Price: \$2,180</b> 3/4 ctw Oval Shape Halo Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and White <b>QUOT QTY: 1</b>	<b>30410FGWG-1.50</b> <b>Price: \$6,540</b> 1 1/2 Ctw Round Cut Diamond Three-Stone Ring in 14K White Gold <b>QUOT QTY: 1</b>	<b>258M3FGYW-LE-OV</b> <b>Price: \$1,670</b> 1/2 ctw Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and White Gold <b>QUOT QTY: 1</b>
			
ASHI	ASHI	ASHI	ASHI
<b>25600FVWG-LE-1.45</b> <b>Price: \$6,680</b> 1 1/2 Ctw Diamond Engagement Ring with 3/4 Ct Princess Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>252D0FVWG-LE-1.45</b> <b>Price: \$6,690</b> 1 1/2 Ctw Diamond Engagement Ring with 3/4 Ct Princess Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>246M1FHWG-LE</b> <b>Price: \$3,490</b> 1 Ctw Past, Present & Future Diamond Engagement Ring With 3/8 ct Round Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>	<b>15460FVWG-LE-1.30</b> <b>Price: \$6,960</b> 1 1/3 Ctw Diamond Engagement Ring with 3/4 Ct Princess Cut Center Stone in 14K White Gold <b>QUOT QTY: 1</b>

43. The List View print page displays the Sales Quotation Report in list view, with styles appearing one below the other, along with the Company Logo, Store Information, and all details, including the inventory message.



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### SALES QUOTATION REPORT

Company Name:	CARTER JEWELERS (JACKSON, MS)			
Quotation Ref.:	RINGS 2024	Quote Update Date:	09/09/2024	User Name: Ranu Trivedi (Sales Associate)
Quotation #:	SQ-16590	Quote Creation Date:	08/23/2024	Quote Status: Active

#	Style Info	Style Price	Qty	Total Price
1	 <p><b>33340FHYG-3.00</b>                      Round Shape 5 Stone Diamond                      Wedding Band</p> <p style="font-size: small; color: #888;">VSB</p> <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block;">New</div>	3 Ctw 5 Stone Round Cut Diamond Wedding Band in 14K Yellow Gold  <b>\$18,940</b>	1	<b>\$18,940</b>
1 In Stock, Call Office to Confirm				
2	 <p><b>260M2FGYW-LE-OV</b>                      Oval Shape Halo Diamond                      Engagement Ring</p> <p style="font-size: small; color: #888;">VSB</p> <div style="background-color: #dc3545; color: white; padding: 2px; display: inline-block;">Best Seller</div>	3/4 ctw Oval Shape Halo Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and	1	<b>\$2,180</b>
In Stock, Ready to Ship				
3	 <p><b>30410FGWG-1.50</b>                      Round Shape Past Present &amp; Future                      Diamond Engagement Ring</p> <p style="font-size: small; color: #888;">VSB</p> <div style="background-color: #dc3545; color: white; padding: 2px; display: inline-block;">Best Seller</div>	1 1/2 Ctw Round Cut Diamond Three-Stone Ring in 14K White Gold	1	<b>\$6,540</b>
In Stock, Ready to Ship				









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**JACKSON, MS 39201 | 601-354-3549 CARTERDIAMONDS.COM**

### SALES QUOTATION REPORT

Company Name:	<b>CARTER JEWELERS (JACKSON, MS)</b>			User Name:	<b>Ranu Trivedi (Sales Associate)</b>
Quotation Ref.:	<b>RINGS 2024</b>	Quote Update Date:	<b>09/09/2024</b>	Quote Status:	<b>Active</b>
Quotation #:	<b>SQ-16590</b>	Quote Creation Date:	<b>08/23/2024</b>		

#	Style Info	Style Price	Qty	Total Price
1	 <b>33340FHYG-3.00</b> Round Shape 5 Stone Diamond Wedding Band 3 Ctw 5 Stone Round Cut Diamond Wedding Band in 14K Yellow Gold <span>New</span>	<b>\$18,940</b>	<b>1</b>	<b>\$18,940</b>
			1 In Stock, Call Office to Confirm	
2	 <b>260M2FGYW-LE-OV</b> Oval Shape Halo Diamond Engagement Ring 3/4 ctw Oval Shape Halo Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and <span>Best Seller</span>	<b>\$2,180</b>	<b>1</b>	<b>\$2,180</b>
			In Stock, Ready to Ship	
3	 <b>30410FGWG-1.50</b> Round Shape Past Present & Future Diamond Engagement Ring 1 1/2 Ctw Round Cut Diamond Three-Stone Ring in 14K White Gold <span>Best Seller</span>	<b>\$6,540</b>	<b>1</b>	<b>\$6,540</b>
			In Stock, Ready to Ship	
4	 <b>258M3FGYW-LE-OV</b> Oval Shape Diamond Engagement Ring 1/2 ctw Round & Oval Cut Diamond Engagement Ring With 1/3 ctw Oval Cut Center Stone in 14K Yellow and White Gold <span>Best Seller</span>	<b>\$1,670</b>	<b>1</b>	<b>\$1,670</b>
			In Production, Available by Sep 26	

44. On the Sales Quotation Detail page of inactive quotations, the contents will be greyed out. Except for the Email, Print, and Delete icons, all other details will be non-editable. You can activate the quotation by clicking the “Quote Status” change button.

**SEARCH & ADD STYLES**

- ASHI Document
- My Frequently Ordered
- My Top Ordered
- Flyer Program
- ASHI Catalog
- Product Categories
- Style Id

SEARCH STYLES

### Sales Quotation

Please add styles to your Sales Quotation. ✉️ 🖨️ 🗑️

Quotation Ref.: BRIDAL 2024 ✎ Quote Update Date: 08/10/2024 User Name: MR. JERRY LAKE (Admin)

Quotation #: SQ-12850 Quote Creation Date: 05/24/2024 Quote Status:  ⓘ

Select All (0) Items Selected

#	Style Info	Style Price	Qty	Total Price	
1	<div style="display: flex; align-items: center;"> <div> <p>244M1FHWG-LE Oval Shape Past Present &amp; Future Halo Diamond Engagement Ring</p> <p style="background-color: #f4a460; color: white; padding: 2px; font-size: 0.8em;">Best Seller</p> </div> </div> <div style="margin-top: 10px;"> <input type="checkbox"/> Select                             <span style="margin-left: 10px;"> <input type="button" value="Add to Cart"/> <input type="button" value="Add to Wish List"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> </span> </div>	1 Ctw Past, Present & Future Round Cut Diamond Engagement Ring With 3/8 ct Oval Cut Center Stone in 14K White Gold	\$1,845	1 <span style="font-size: 0.8em;">▼</span>	\$1,845
<div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Enter Your Style Comments</div> <p style="font-size: 0.8em; color: #f4a460; margin-top: 5px;">In Production, Available by Aug 20</p>					
2	<div style="display: flex; align-items: center;"> <div> <p>241G2FHWG-LE-RD Round Shape Halo Diamond Engagement Ring</p> <p style="background-color: #f4a460; color: white; padding: 2px; font-size: 0.8em;">Best Seller</p> </div> </div> <div style="margin-top: 10px;"> <input type="checkbox"/> Select                             <span style="margin-left: 10px;"> <input type="button" value="Add to Cart"/> <input type="button" value="Add to Wish List"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> </span> </div>	3/4 Ctw Diamond Ladies Engagement Ring with 1/2 Ct Round Cut Center Stone in 14K White Gold	\$1,460	1 <span style="font-size: 0.8em;">▼</span>	\$1,460
<div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Enter Your Style Comments</div> <p style="font-size: 0.8em; color: #f4a460; margin-top: 5px;">In Stock, Ready to Ship</p>					

**QUOTATIONS LIST**

**MY ACTIVE QUOTATIONS**

- > TOP SELLERS
- > ENGAGEMENT RING
- > SILVER JWLRY
- > BRIDAL 2024 Show More

**OTHER ACTIVE QUOTATIONS**

- > PRODUCTEMAIL251
- > PRODUCTEMAIL243
- > PRODUCTEMAIL255
- > 1

**MY PAST QUOTATIONS**

- > PETITE 2024

## STYLES ADDED FROM SALES QUOTATION TO ORDER CART

45. When you add styles from Sales Quotation to Order Cart then the Sales Quotation Reference and User Name are displayed next to the corresponding style in the Order Cart.

### Order Cart

Please Select the Styles you wish to Order or Search and Add Styles from your previous Documents (Orders, Invoices, Memo), and Frequently Ordered & Top Ordered Styles, POS Displays, Marketing Programs etc.

Please Review your Order information before Placing your Order.

✉ 🖨 🛒 REVIEW ORDER

Billing Information	Contact Information	*Purchase Order Information	Shipping Information
CARTER JEWELERS (JACKSON, MS) JEWELRY MARKETING, INC. 711 HIGH STREET JACKSON, MS 39201	MR. JERRY LAKE Tel#: 601-354-3549 Fax#: 601-354-8960 avalontester1@gmail.com	*PO Number: <input type="text"/> *PO Placed By: MR. JERRY LAKE *PO Ship Date: 05/31/2024 <span>📅</span> *PO Cancel Date: 08/29/2024 <span>📅</span>	Select Shipping Method: <span>▼</span> JEWELRY MARKETING, INC. <span>▼</span> CARTER JEWELERS (JACKSON, MS) JEWELRY MARKETING, INC. 711 HIGH STREET JACKSON, MS 39201

#	Style Info	Style Price	Qty	Total Price
1	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 80%;"> <p>25820FRW-LE-3.00 Princess Shape Past Present &amp; Future Diamond Engagement Ring</p> <div style="display: flex; gap: 5px;"> <span>♡</span> <span>✉</span> <span>🗑</span> </div> </div> <div style="width: 15%; border: 2px solid red; padding: 2px; font-size: 0.8em;"> <p>The style is added from the SQ Reference BRIDAL 2024 to Order Cart.</p> </div> </div> <p style="font-size: 0.7em; margin-top: 5px;">Sales Quotation Ref.: BRIDAL 2024 (User: MR. JERRY LAKE)</p>	\$8,910	1 <span>▼</span>	\$8,910
Last Updated by: MR. JERRY LAKE		Total Qty: 1		Total Amt: \$8,910

## STYLES ADDED FROM SALES QUOTATION TO WISH LIST

46. When you add styles from Sales Quotation to Wish List then the Sales Quotation Reference and User Name are displayed next to the corresponding style in the Wish List. You can also add a style from Wish List to any of your Active Sales Quotations.

### Wish List

Please enter the Styles you wish to add to your Wish List or Search and Add Styles from previous ASHI Documents or Flyer Programs.

✉ 🖨 🗑 🛒 MOVE TO ORDER CART

#	Style Info	Style Price	Qty	Total Price
1	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 80%;"> <p>25820FRW-LE-3.00 Princess Shape Past Present &amp; Future Diamond Engagement Ring</p> <div style="display: flex; gap: 5px;"> <span>🛒</span> <span>✉</span> <span>📄</span> <span>🗑</span> </div> </div> <div style="width: 15%; border: 2px solid red; padding: 2px; font-size: 0.8em;"> <p>The style is added from the SQ Reference BRIDAL 2024 to Wish List.</p> </div> </div> <p style="font-size: 0.7em; margin-top: 5px;">Sales Quotation Ref.: BRIDAL 2024 (User: MR. JERRY LAKE)</p>	\$8,910	1 <span>▼</span>	\$8,910
Last Updated by: MR. JERRY LAKE		Total Qty: 1		Total Amt: \$8,910

✉ 🖨 🗑 🛒 MOVE TO ORDER CART

## EMAIL SALES QUOTATION

47. You can email a Sales Quotation from the Sales Quotation Detail page to different users or customers, either at Cost Price, Retail Price, or No Price.

Recipients will receive an email in their inbox containing Sales Quotation details, which will display prices based on the chosen pricing option: cost price, retail price, or no price.

**Sales Quotation**  
Please add styles to your Sales Quotation.

Email

Quotation Ref.: <input type="text" value="STACKABLE RINGS"/>	Quote Update Date: 06/28/2024	User Name: MR. JERRY LAKE (Admin)
Quotation #: SQ-14710	Quote Creation Date: 06/28/2024	Quote Status: <input checked="" type="checkbox"/>

Select All (0) Items Selected
  Add Selected Items to Quotation
 Add Selected Items to Wish List
 Add Selected Items to Order Cart

48. When you click the **Email icon** on the Sales Quotation Detail page, an “**Email Sales Quotation**” pop-up will appear with the following options:

**Email Sales Quotation To\*** – You can email the quotation to the Customer, Internal User, or ASHI.

**Sales Quotation Price\***– You can send the email at Retail Price, No Price, or Cost Price.

**Email Sales Quotation**

Email Sales Quotation To\* :  Customer  Internal User  ASHI

Sales Quotation Price\* :  Retail Price  No Price  Cost Price

300 characters remaining.

**EMAIL QUOTATION**

49. You can email the quotation to any of your customers by selecting “**Customer**” and either “**Retail Price**” or “**No Price**”. In this case, you need to enter the Customer Name and Customer’s Email Address.

Please note: You will not be able to send the quotation to your customer at the Cost Price.

50. When you select “**Internal User**” and “**Cost Price**”, the “**Select Internal Users**” dropdown will display all users who can view styles at Cost Price.

The screenshot shows the 'Email Sales Quotation' form with the following configuration:

- Email Sales Quotation To\* :**  Customer **i**  Internal User **i**  ASHI **i**
- Sales Quotation Price\* :**  Retail Price **i**  No Price **i**  Cost Price **i**
- Name:** Jerry Lake
- Email:** jerrylake@gmail.com
- Phone:** 601-354-3549
- Mobile #:** Your Mobile #
- Select Internal Users:**
  - MR. JERRY LAKE (Retailer Admin)
  - PRIYEN MAKIM (ASHI Sales Rep)
  - Account Manager (Account Manager - Cost Price)
  - Demo AM (Account Manager - Cost Price)
  - Demo PM (Purchase Manager - Cost Price)
  - Jessica Silbert (Purchase Manager - Cost Price)
  - RANU BORKAR (Purchase Manager - Cost Price)
  - RANU BORKAR (Purchase Manager - Cost Price)
  - RANU BORKAR (Account Manager - Cost Price)
  - Sachin Nahta (Purchase Manager - Cost Price)
  - Sachin Nahta (Purchase Manager - Cost Price)
  - shanjida bhuiyan (Purchase Manager - Cost Price)

51. If you select “**Internal User**” and “**Retail Price**”, the “**Select Internal Users**” dropdown will display all users who can view styles at Retail Price.

The screenshot shows the 'Email Sales Quotation' form with the following configuration:

- Email Sales Quotation To\* :**  Customer **i**  Internal User **i**  ASHI **i**
- Sales Quotation Price\* :**  Retail Price **i**  No Price **i**  Cost Price **i**
- Name:** Jerry Lake
- Email:** jerrylake@gmail.com
- Phone:** 601-354-3549
- Mobile #:** Your Mobile #
- Select Internal Users:**
  - MR. JERRY LAKE (Retailer Admin), Jessica Silbert (Sales Associates - Retail Price), michelle graff (Sales Associates - Retail Price)
  - MR. JERRY LAKE (Retailer Admin)
  - PRIYEN MAKIM (ASHI Sales Rep)
  - Amy Bremser (Sales Associates - Retail Price)
  - Anjali K (Sales Associates - Retail Price)
  - barry cole (Sales Associates - Retail Price)
  - Jessica Silbert (Sales Associates - Retail Price)
  - Jessica Silbert (Sales Associates - Retail Price)
  - Ranu Trivedi (Marketing Manager - Retail Price)
  - Marketing Manager (Marketing Manager - Retail Price)
  - michelle graff (Sales Associates - Retail Price)

52. If you select “Internal User” and “No Price”, the “Select Internal Users” drop-down will display all users who can view styles, including both Cost Price and Retail Price.

The screenshot shows the 'Email Sales Quotation' form. The 'Email Sales Quotation To\*' field has three radio buttons: 'Customer', 'Internal User' (selected), and 'ASHI'. The 'Sales Quotation Price\*' field has three radio buttons: 'Retail Price', 'No Price' (selected), and 'Cost Price'. Below these are input fields for 'Jerry Lake', 'jerrylake@gmail.com', '601-354-3549', and 'Your Mobile #'. A dropdown menu labeled 'Select Internal Users' is open, displaying a list of users with checkboxes:

- MR. JERRY LAKE (Retailer Admin)
- PRIYEN MAKIM (ASHI Sales Rep)
- Account Manager (Account Manager - Cost Price)
- Amy Bremser (Sales Associates - Retail Price)
- Anjali K (Sales Associates - Retail Price)
- AVALON (Sales Associates - Retail Price)
- Praveen Mandpe (Purchase Manager - Cost Price)
- Purchase Manager (Purchase Manager - Cost Price)
- Rajeev Pandya (Purchase Manager - Cost Price)
- RANU BORKAR (Purchase Manager - Cost Price)
- RANU BORKAR (Purchase Manager - Cost Price)
- RANU BORKAR (Account Manager - Cost Price)

53. You can email the quotation to **ASHI at Cost Price only**. In this scenario, all the fields are pre-filled and non-editable.

Please note: You will not be able to send the quotation to ASHI at Retail Price or No Price.

The screenshot shows the 'Email Sales Quotation' form with 'ASHI' selected under 'Email Sales Quotation To\*' and 'Cost Price' selected under 'Sales Quotation Price\*'. The form is pre-filled with the following information:

- Name: Jerry Lake
- Email: jerrylake@gmail.com
- Phone: 601-354-3549
- Your Mobile #: Your Mobile #
- Company: ASHI Diamonds
- Email: quotation@ashidiamonds.com
- ASHI Sales Quotation Ref.: WEDDING BANDS by Jerry Lake from CARTER JEWELERS
- Comments: (Empty text area)


At the bottom right, it indicates '300 characters remaining.' and there is an orange button labeled 'EMAIL QUOTATION' with an envelope icon.



54. Before emailing the quotation, you can add your comments in the comment box. These comments will be displayed to the recipient in the email.


I am pleased to provide you with the Sales Quotation. Please review the details below and let me know if you have any questions or require further assistance.

132 characters remaining.

 **EMAIL QUOTATION**

55. Recipients will receive the Sales Quotation via email, with prices displayed at Cost Price, Retail Price, or No Price, depending on the chosen option and their access rights.

**Sales Quotation Email copy for the recipients >**



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**Dear Team,**

**Jerry Lake** visited the ASHI Website and would like to share their Sales Quotation with you.

**Note:** I am pleased to provide you with the Sales Quotation. Please review the details below and let me know if you have any questions or require any further assistance.

To view more details about these Styles, please click on any Style Picture or Style Id.

Please note, you can easily add the recommended styles to your ASHI B2B Order Cart or Wish List.

#	Style Info	Qty	Amount
1	 <p><a href="#">33340FGWG-3.00</a>  <b>ROUND SHAPE 5 STONE DIAMOND WEDDING BAND</b>                      Price: \$6,545</p>	1	\$6,545

**In Stock, Ready to Ship**

**Best Seller**

56. Retailer Admin, Salesmen, Purchase Managers, and Accounting Managers will receive emails with all pricing options available. However, Sales Associates, Marketing Managers, and other customers will receive emails with Retail or No-Price options only.
57. The Sales Quotation functionality is available fully on Desktop and iPad. However, on mobile devices, you can only add styles to Sales Quotations but you cannot view the Sales Quotation Report Page or Sales Quotation Detail Page. For full access, please log in from the desktop.

For more info on the **Sales Quotation Module**, please call ASHI at 800.622.ASHI or contact your Regional Sales Representatives or visit [www.ashidiamonds.com](http://www.ashidiamonds.com).