

## How to Use the Blind Expert Quote Register to Save and Recall Quotes

The Blind Expert Quote Register is designed to help you save completed quotes, recall them later, make changes, and quickly issue updated pricing or documents when needed. This avoids re-entering quote information from scratch and helps keep quote records organised.

### What this feature helps you do

Using the Quote Register, you can:

- save completed quotes for future use
- recall existing quotes back into the worksheet
- update customer or product details
- regenerate pricing after changes
- save revised quotes as new versions
- email updated quote documents to customers
- reuse quote information when progressing to the next stage of the job

### How the Quote Register works

#### 1. Generate the quote

Start by preparing the quote in the Job Entry sheet, then generate the quote in the normal way.

Once the quote has been created, you can click the **Add to Register** button at top of the worksheet to save it.

#### 2. Confirm the quote details

When adding the quote to the register, the system will prompt you to confirm whether the details are correct.

The register includes four tabs:

- Register
- Recall Customer
- Recall Lines
- Recall Accessories (in some cases only)

If the details are correct, confirm the entry and the quote will be saved.

If not, you can stay in the register and edit the details before closing.

### **3. Make sure the job name is unique**

This is one of the most important parts of using the Quote Register. If the same job name is used more than once, duplicate entries can appear in the register which will cause incorrect data selection. If the job name is not unique, the entry will appear in Red on the Register tab, which gives you an opportunity to revise the job name, eg v2 etc.

**The uniqueness of the saved entry is what allows the system to correctly bring the quote back and reload it later.**

If needed, rename the job so it is clearly different, such as:

- Brown 2
- Smith Sydney Revised

### **4. Recall an existing quote**

To reload a saved quote, press the button at top of the Job Entry/Project Entry tab and search for the customer or job name in the register.

Once you select the correct record, return to the Job Entry sheet and the workbook automation will upload and break any links. This uploads the saved quote data back into the worksheet and restores the original job information.

When complete, the register closes and the quote is reloaded into the sheet, ready for editing.

### **5. Update the recalled quote**

Once the quote is back in the worksheet, you can make any required changes.

For example, if the customer changes the fabric colour, you can update that selection and apply it across the relevant lines. You can then regenerate the quote, so the revised pricing and quote documents reflect the new selections.

This makes it easy to revise an earlier quote without rebuilding the job from the beginning.

## 6. Save and send the revised version

After regenerating the revised quote, you can:

- save the quote as a PDF
- email it to the customer
- add the revised version back into the Register

It is important to save the revised quote under a **new unique name**, as it is not possible to replace the original version. This makes it easier to track quote history and compare versions if needed.

### Important points to remember

**Always use a unique job name when saving to the register.**

This is essential for accurate recall later.

**Use Upload Old Quote button to reload the saved quote into the worksheet.**

This is the step that restores the quote for editing.

**Save revised versions as a new entry where practical.**

This helps preserve the original quote and keeps a record of changes.

### Why this feature matters

The Quote Register is more than just a storage list. It is a practical workflow tool that helps you manage quote history, update customer jobs efficiently, and reduce repetitive rework. It also gives you tools to manage quote follow-up.

Instead of rebuilding an old quote from scratch, you can reload it, make the required changes, regenerate the pricing, and send an updated version quickly.

For busy retailers and fabricators, this can save considerable time while also improving consistency and record keeping.

### Key takeaways

- The Quote Register allows quotes to be saved and recalled later
- Saved entries must always be **unique** for correct operation
- Recalled quotes can be edited, repriced, regenerated, and resent
- Revised quotes should be saved as a new version
- This feature helps save time and improve workflow consistency
- Quote tracking and follow-up tools are included.