

/ Parts with Labor Sales Entry /

Updated April 14, 2016

QTC
—

qtc.ct.spx.com/qtc

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

OPPORTUNITY SEARCH

New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

SEARCH
CLEAR FILTERS

Enter one or more search criteria and click the 'Search' button to display the list. Use the % character for wildcard searches (e.g. %mechanical). Note that multiple selections can be made within multi-line list boxes by holding down the Ctrl key.

Search Criteria

Opportunity Name: Robert Swafford

Description: %template

End-User Company: [Empty]

End-User City: [Empty]

End-User State: [Empty]

End-User Country: [Empty]

Sales Rep: [Empty]

SPX Order #: [Empty]

SPX Project #: [Empty]

Status: [Lost, No Bid, Open, Won]

Days Old: [Select Days Old]

Active: [Select Active Indicator]

Opportunity Type: [Corporate Purchase, Design/Build, EPC, End-User Purchase]

Anticipated Order Type: [Customer Goodwill, Factory Assembled Product, Field Erected Applied Product, Field Erected Product]

Anticipated Order Point: [Select Order Point]

Competitor Info: [Select Product]

Opportunity Name	Description	Order# Project#	Status	Potential Amount	Currency	End-User Company	City	State	Market	Active	Type	Sales Rep	Sales Team
ROBERT SWAFFORD_110825_045155788	Template - Parts with Labor		Open		US Dollar	QTC Generic Company (USA)			Heavy Industrial	✗	Reconstruction/Repair	Robert Swafford	SPX CT Employee Only
ROBERT SWAFFORD_130715_112959517	Parts Pricing Template		Open	32,186.04	US Dollar	French & Company Inc	Jacksonville	FL	HVAC	✓	Parts	Robert Swafford	SPX CT Employee Only
ROBERT SWAFFORD_130715_112959517	Warranty		Open		US Dollar	QTC Generic Company (USA)			HVAC	✓	Warranty	Robert Swafford	SPX CT Employee Only

1

 Enter your name in here

2

 Enter %template in here

3

 Click Search

4

 Click Copy Opportunity icon for the template with the description that matches your opportunity

/ Creating a Proposal /

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Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

COMPANIES

COPY OPPORTUNITY
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

Opportunity Information

* Opportunity Name: LORI HUGHES_160414_1150

* Description: [Empty]

* End Use: QTC Generic Company (US)

Market: HVAC

* Application: Hospitals & Health Treatment

* Type: Reconstruction/Repair

* Anticipated Order Point: Overland Park, KS, USA

Default Engineer: [Empty]

Union Labor:

Active: Uncheck on templates, otherwise leave checked and just update status.

Outlook Indicator:

Point of Installation Exclude from Opp/Qt Region recode

Sales Region: East Zone- HVAC & LI: Central

* Sales Territory: No rep-HVAC&LtIndus W Zone

* Sales Team: SPX CT Employee Only

Rep Office: SPX COOLING TECHNOLOGII

* Sales Rep: Robert Swafford

Status: Open

Default Ship To: Credit Valley Hospital, (Compar...)

2200 Eglinton Ave W
Mississauga, Ontario L5M 2H5
Canada

Display Currency: US Dollar

1

Fill in fields that have red asterisks (*) but no information in them

2

Click Save

Check "Union Labor" if applicable

If you search for a company and they are not in QTC, see next page for adding a new

Sales Territory / Region is what drives commission

Sales Team is QTC's security – determines who can see what

Default ship-to on the Opportunity will auto-populate on any quotes added to the opportunity

Opportunity Edit

/ Adding a New Company /

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Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

COMPANIES

COPY OPPORTUNITY
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

New Company Information

Company For: Default Ship To

* Company Name:

* Company Type: Shipping Address*

* Company Class: Select Company Class

Sales Region: East Zone- HVAC & LI: Central

* Sales Territory: No rep-HVAC&LtIndus W Zone

* Sales Team: All Sales

Address Can Never Accept Shipments (PO Box, etc)

* Address Type: Select address type

* Address Line 1:

Address Line 2:

Address Line 3:

City:

Country:

State:

* Country: Select Country

Zip Code: -

SAVE COMPANY

CANCEL COMPANY

Click Save

2

Opportunity Information

* Opportunity Name: LORI HUGHES_160414_1150

* Description:

* End User: QTC Generic Company (USA)

Point of Installation Exclude from Opp/Qt Region recode

Sales Region: East Zone- HVAC & LI: Central

* Sales Territory: No rep-HVAC&LtIndus W Zone

Sales Team: SPX CT Employee Only

Rep Office: SPX COOLING TECHNOLOGII

* Sales Rep: Ro

Company Types

- > Customer can be used for Sold-to, Ship-to and End User
- > Shipping Address can be used as Ship-to and End User

Opportunity Edit

Populate information in fields that have red asterisks (*) next to them in the New Company Information section

1

Click Save

2

/ Creating a Proposal /

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Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

OPPORTUNITY DETAILS
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

1

Click Add Quote

ADD QUOTE
ADD TASK
ADD INFLUENCER
ADD COMPETITOR INFO

Opportunity Information

Opportunity Name : LORI HUGHES_160414_115347425

Description : Repairs

End User : [QTC Generic Company \(USA\)](#)

Market : HVAC

Application : Hospitals & Health Treatment

Type : Reconstruction/Repair

Anticipated Order Type : Parts with Labor

Anticipated Order Point : Overland Park, KS, USA

SPX Order # :

SPX Project # :

Default Engineer :

Union Labor : ✓

Active : ✓

Outlook Indicator : ✓

Point of Installation ✗ Exclude from Opp/Qt Region recode

Sales Region : East Zone- HVAC & LI: Central (Miller)

Sales Territory : No rep-HVAC&LtIndus W Zone: Central (Miller)

Sales Team : SPX CT Employee Only

Rep Office : SPX COOLING TECHNOLOGIES

Sales Rep : Robert Swafford ✉ 📄

Display Currency : US Dollar

Status : Open

Close Date (won, lost, etc.):

Use 'Edit Opportunity Status Info' link on Opportunity Search to change status.

Default Ship To : [\(Company\) Credit Valley Hospital](#)
2200 Eglinton Ave W
Mississauga, ON
L5M 2N1
Canada

Go Probability % : 100 Total Probability % : 50.0

Get Probability % : 50

Potential Amount : 15,123.69

End User Company Notes

Opportunity Details

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR COSTS

ORDER DETAILS

COMMISSIONS

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

NEW QUOTE
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

* Quote Name: Lori Hughes_160414_1350599

Description: Repairs

* Quote To / Sold To: QTC Generic Company
unknown United States

* Quote Type: Parts with Labor

Sales Influence: [dropdown]

Anticipated Order Date: dd/mm/yyyy

* Requested Ship Date: dd/mm/yyyy

Get Probability %: [dropdown] = Total Probability %

* Reason Won/Lost: [dropdown]

* Freight Term: Prepaid S&H

Example: Kansas City, Kansas, USA railyard, containerized shipment

* Carrier Type: SPX CT Choice - Standard Ground

* Manufacture Point: Overland Park, KS, USA

SPX Order #: [input]

Change Order #: [input]

SPX Project #: [input]

Engineer: [input]

Ship To Contact: Credit Valley Hospital, (Compar [input])

Primary [checked]

Active [checked] Version: 1

Opportunity Info

Opportunity Name: Lori Hughes_160414_115347425

Description: Repairs

End User: QTC Generic Company (USA)

Potential Amount: 15,123.69

Parts, Recon, or Tower Replacement

* Original Tower Mfr: Marley

Original Tower Model #: sigma 1022

Original Reference #: 104476j

Won/Lost Explanation

Quote Edit

Click Save **5**

In addition to manufacturer, please include details on Original Tower Model and Reference # **3**

Change Freight Term to Ex-Works if it is not part of SPX's supply **2**

Fill in fields that have red asterisks (*) but no information in them **1**

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

EDIT QUOTE
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

Quote Notes (also used for general order notes to Order Administrator)

Additional Quote Information

<p>Specified Manufacturer: <input type="text"/></p> <p>* Quote Category: Firm</p> <p>Sales Rep's Quote #: <input type="text"/></p> <p>Quote Status: Pending/New</p> <p>Order Status: <input type="text"/></p> <p>Selling Condition: Direct</p> <p>Validity Days: 30</p> <p>Display Currency: US Dollar</p> <p>* Price Effective Date: 04/14/2016</p> <p>Quote Specialist: <input type="text"/></p>	<p>Point of Purchase <input type="checkbox"/> Exclude from Opp/Qr Region recode</p> <p>Quote-To Region: East Zone- HVAC & LI: Central</p> <p>* Quote-To Territory: No rep-HVAC&LI:Indus W Zone</p> <p>* Sales Team: SPX CT Employee Only</p> <p>Rep Office: SPX COOLING TECHNOLOGIE</p> <p>* Quote-To Rep: Robert Swafford</p> <p>Construction Labor Included: Yes</p> <p>Use Tax Application: <input type="text"/></p> <p><small>Use Tax must generally be added when construction labor is included. Contact the SPX Cooling Technologies tax department if you have questions.</small></p> <p><small>Old labor indicator -- DO NOT USE</small> <input type="checkbox"/></p>
--	--

Quote-To / Sold-To Company Notes

Click Save

5

4

Select Use Tax

Quote Edit

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

COMPANIES

QUOTE DETAILS
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

Date :

Requested Ship Date : 09/16/2016

Date :

Get Probability % : Total Probability %

Reason Won/Lost :

Freight Term : Prepaid S&H

Incoterm Named :

Place :

Carrier Type : SPX CT Choice - Standard Ground

Manufacture : Headquarters

Point :

SPX Order # :

Change Order # :

SPX Product # :

Engineer :

Description : Repairs

End User : QTC Generic Company (USA)

Potential Amount : 0.00

Parts, Recon, or Tower Replacement

Original : Marley

Manufacturer :

Original Tower : sigma 1022

Model :

Original Order # : 104476

Won/Lost Explanation

Ship To Contact : [Credit Valley Hospital, \(Company\)](#)
2200 Eglinton Ave W
Mississauga, ON
L5M 2N1
Canada

Order will be placed with **Overland Park, KS, USA** based on Original Manufacturer and Sold-To company in **United States**.
Cost shown is **Overland Park, KS, USA** cost = Estimated **Headquarters** cost . No taxes or duties are included in this cost.

1

Complete Labor Considerations before submitting a RFQ

2

Add Schedule dates

ADD PRODUCT

QUICK ADD PRODUCTS

ADD CUSTOM LINE ITEM

ADD FROM CONFIGURATION CART

CHECK AVAILABILITY

ADD MY PARTS

ADD FROM UPDATE

ADD FROM BEST

Product Name	Description	Quantity	Material Target	Labor Target	Material Discount	Labor Discount	Material Price	Labor Price	Freight	Total Price
No Line Items										

Quote Details

/ Creating a Proposal /

You now have 5 options for how you can add Parts and Labor to your quote in QTC:

1. Add Parts using the Part Number - Pages 10-11
2. Add Parts from the Service Record - Pages 12-16
3. Add Parts using Alternate Search - Pages 17-21
4. Submit an RFQ for Material and Labor quote - Pages 22-23
5. Adding a Labor Line Item - Pages 24-26

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

QUOTE DETAILS
New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

Date :
Requested Ship 09/16/2016
Date :
Get Probability % : Total Probability %
Reason Won/Lost :
Freight Term : Prepaid S&H
Incoterm Named
Place :
Carrier Type : SPX CT Choice - Standard Ground
Manufacture : Headquarters
Point :
SPX Order # :
Change Order # :
SPX Project # :
Engineer :

Description : Repairs
End User : QTC Generic Company (USA)
Potential Amount : 0.00

Parts, Recon, or Tower Replacement

Original : Marley
Manufacturer :
Original Tower : sigma 1022
Model :
Original Order # : 104476

Won/Lost Explanation

Ship To Contact : Credit Valley Hospital, (Company)
2200 Eglinton Ave W
Mississauga, ON
L5M 2N1
Canada

Order will be placed with **Overland Park, KS, USA** based on Original Manufacturer and Sold-To company in **United States**.
Cost shown is **Overland Park, KS, USA cost** = Estimated **Headquarters cost** . No taxes or duties are included in this cost.

ADD PRODUCT
QUICK ADD PRODUCTS
ADD CUSTOM LINE ITEM
ADD FROM CONFIGURATION CART
CHECK AVAILABILITY
ADD MY PARTS
ADD FROM UPDATE
ADD FROM BEST

Products

	Product Name	Description	Quantity	Material Target	Labor Target	Material Discount	Labor Discount	Material Price	Labor Price	Freight	Total Price
No Line											

Click Quick Add Products

1

Adding Parts Using Part Number

Quote Details

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

QUICK ADD PRODUCTS

New Save Undo Edit Copy Delete Preferences Logoff

QUICK ADD PRODUCTS GET PART DESCRIPTIONS

Include	Part Number	Quantity	Description	Product Type
<input checked="" type="checkbox"/>	220517	1	HEATER IMMERSION, 7.5KW 3/4"Ø	220
<input checked="" type="checkbox"/>	A81137	1	HEATER INDEECO PROBE ASSY, INDEECO 1003019 12' CORD 220	

1 Enter your part number in here

2 Enter quantity required here

3 Click here to add more lines

4 Click here to get Part Descriptions

5 Check the parts are what you were looking for

6 Check the parts are what you were looking for

7 Click Save

Adding Parts from using Part Number

Quick Add Products

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

QUOTE DETAILS

New Save Undo Edit Copy Delete Preferences Logoff

HIDE

Quote Name : Lori Hughes_160414_135059933

Description : Repairs

Quote To / Sold To : [QTC Generic Company \(USA\)](#)

Quote Type : Part-Lbr

Sales Influence :

Anticipated Order Date : 04/14/2016

Requested Ship Date : 09/16/2016

Get Probability % : **Total Probability %**

Reason Won/Lost :

Freight Term : Prepaid S&H

Incoterm Named Place :

Carrier Type : SPX CT Choice - Standard Ground

Manufacture Point : Headquarters

SPX Order # :

Change Order # :

SPX Project # :

Engineer :

Primary : ✓

Active : ✓

Version : 1

Opportunity Information

Opportunity Name : LORI HUGHES_160414_115347425

Description : Repairs

End User : QTC Generic Company (USA)

Potential Amount : 0.00

Parts, Recon, or Tower Replacement

Original Manufacturer : Marley

Original Tower Model : sigma 1022

Original Order # : 104476

Won/Lost Explanation

Ship To Contact : [Credit Valley Hospital. \(Company\)](#)
2200 Eglinton Ave W
Mississauga, ON
L5M 2N1
Canada

Order will be placed with **Overland Park, KS, USA** based on Original Manufacturer and Sold-To company in **United States**.
Cost shown is **Overland Park, KS, USA** cost = Estimated **Headquarters** cost . No taxes or duties are included in this cost.

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

COMPANIES

1

Click Add Product

ADD PRODUCT

QUICK ADD PRODUCTS

ADD CUSTOM LINE ITEM

ADD FROM CONFIGURATION CART

CHECK AVAILABILITY

ADD MY PARTS

ADD FROM UPDATE

ADD FROM BEST

Adding Parts from Service Record

Quote Details



SPX Cooling Technologies
Lori Hughes

ADD PRODUCT TO QUOTE

New Save Undo Edit Copy Delete Preferences Logoff

OPPORTUNITY DETAILS

2 **Click Search**

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

SEARCH CLEAR FILTERS

1

Click Clear Filters

Enter one or more search criteria and click the **SEARCH** button to display the list. Use the % character for wildcard searches (e.g. %mechanical).

Search Criteria

Part Number

Product Family

Product Type

Product Subtype

Description

Config Ind

[PARTS CATALOG](#)

[<< First](#)
[< Previous](#)
[1](#)
[2](#)
[3](#)
[4](#)
[Next >](#)
[Last >>](#)

	Part Number	Description	Ship Weight	Lead Time	Price	Drawing	Configurable
✱	MDSeries	MD Series					✓
✱	MH71Series	MH Fluid Cooler					✓
✱	MWSeries	Recold MW Series					✓
✱	NC84Tower	NC8400 Tower					✓
✱	NX10Tower	NX1000 Tower					✓
✱	PartsSearch	Marley Parts Search					✓
✱	Quadraflow	Quadraflow					✓
✱	Recon	Reconstruction Information					✓
✱	RTTower	RT Tower (rental)					✓

3 **Click on the configure icon for the Marley Parts Search**

Adding Parts from Service Record

Product Search

/ Creating a Proposal /

1 Check the button for View Service Record Bill of Material

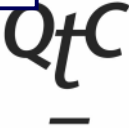
2 Enter the Original Order No. in here

3 Click Go

Some of the service records will have both a scanned in original service record and the digital version. You can only add parts to your quote from the digital service record. If the original record is pulled, either minimize or close the screen to view the digital version behind it.

Adding Parts from Service Record

Configurator



/ Creating a Proposal /

Perf Test: N Additive %:

Warranty: STANDARD

Get	Order#	Tower / Cell	Explode	Item Number	Find#	Description	Qty	Drawing	P.O. Number	P.O. Date
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-151		OPTIONBTM OUTLET SUCTION 14DIA 8615-19	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-175		OPTIONCASING SHEET W/O FLOAT VALVE HOLE	2			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-63		OPTIONCOVERPLATE (ENDCELLS) 8615-19	2			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-108		OPTIONCW BASIN FLOOR CNTR DELETE 8617-19	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-161		OPTIONDELETE SPACER 8615-19	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-5		OPTIONDELETE STD FLOAT VALVE 8619	2			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-129		OPTIONFLUME (CELLS 2'-0 APART) 8615-19	2			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-187		OPTIONHANDRAIL W/1 LDR ENDCELLS NCM-4 861	1			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-170		OPTIONHARDWARE FOR 364T 8615-19	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-178		OPTIONINTERIOR CELL HANDRAIL NCM-4 8617	1			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-128		OPTIONSHIPPING PLATE FOR INT CELLS	1			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-23		OPTIONSIGHT GAUGE 8615-19	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-153		OPTIONSPECIAL HOISTING CLIP 8615-19 (3)	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-106		OPTIONSTANDARD OVERFLOW 8615-19	1			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-108		OPTIONSTANDARD OVERFLOW 8615-19	1			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	73-2598-108		OPTIONSTANDARD OVERFLOW 8615-19	1			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	83-42109-3		TWR-UNNCM-5 8619	3			
<input type="checkbox"/>	ORIGINAL		<input type="checkbox"/>	83-42109-3		TWR-UNNCM-5 8619	3			
<input type="checkbox"/>	140404587		<input type="checkbox"/>	73-41570-1		FAN-AS1200DIA ALUM HUB H-3 4BLADE	1		25-732-0	1964-12-31
						TIO (STD)	1			
						2X3'-7 MTR BORE	1			

Click on Alternate Search **2**

Check the boxes in the Get column for any parts you want to add to your quote – if the box is greyed out, this means the part is not available in QTC **1**

Adding Parts from Service Record

Service Record

/ Creating a Proposal /

Parts Detail Save My Parts | Save | Cancel

*Name:

Description:

Use the check mark to designate if you want to add each part to your quote **1**

Click Save **3**

Include	Quantity	Part Number	Description	List Price	Buy / Resell	Lead Time	Ship Weight	Additional Text	Original Part
<u>Pricing Help</u>									
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	033662	PLATE HDG 3/16X4 3/8X9 7/16	103.00	103.00		2.631	<input type="text"/>	
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	012450	SEALER POLYURETHANE, SIKA-FLEX 201 10.1 OZ TUBE	12.73	12.73		1.8	<input type="text"/>	
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	410092	SEALER STRP BUTYL BASE, 1/2X1/2X25 FT	8.43	8.43		2.4	<input type="text"/>	

Confirm quantity required of each part **2**

Adding Parts from Service Record

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

INFLUENCERS

QUOTE DETAILS

New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

Quote Information

HIDE

Quote Name : Lori Hughes_160414_135059933

Description : Repairs

Quote To / Sold To : [QTC Generic Company \(USA\)](#)

Quote Type : Part-Lbr

Sales Influence :

Anticipated Order Date : 04/14/2016

Requested Ship Date : 09/16/2016

Get Probability % : Total Probability %

Reason Won/Lost :

Freight Term : Prepaid S&H

Incoterm Named Place :

Carrier Type : SPX CT Choice - Standard Ground

Manufacture Point : [Headquarters](#)

SPX Order # :

Change Order # :

SPX Project # :

Engineer :

Opportunity Information

Opportunity Name : LORI HUGHES_160414_115347425

Description : Repairs

End User : QTC Generic Company (USA)

Potential Amount : 0.00

Parts, Recon, or Tower Replacement

Original Manufacturer : Marley

Original Tower Model : sigma 1022

Original Order # : 104476

Won/Lost Explanation

Ship To Contact : [Credit Valley Hospital. \(Company\)](#)
2200 Eglinton Ave W
Mississauga, ON
L5M 2N1
Canada

Order will be placed with **Overland Park, KS, USA** based on Original Manufacturer and Sold-To company in **United States**.
Cost shown is **Overland Park, KS, USA** cost = Estimated **Headquarters** cost . No taxes or duties are included in this cost.

ADD PRODUCT
QUICK ADD PRODUCTS
ADD CUSTOM LINE ITEM
ADD FROM CONFIGURATION CART
CHECK AVAILABILITY
ADD MY PARTS
ADD FROM UPDATE
ADD FROM BEST

Click Add Product **1**

Adding Parts using Alt Search

Quote Details



/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

ADD PRODUCT TO QUOTE

New Save Undo Edit Copy Delete Preferences Logout

SEARCH CLEAR FILTERS PARTS CATALOG

Enter one or more search criteria and click the **SEARCH** button to display the list. Use the % character for wildcard searches (e.g. %mechanical).

Search Criteria

Part Number

Product Type

Description

Product Family

Product Subtype

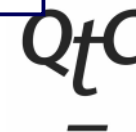
Config Ind

<< First < Previous 1 2 3 4 Next > Last >>

	Part Number	Description	Ship Weight	Lead Time	Price	Drawing	Configurable
✱	MDSeries	MD Series					✓
✱	MH71Series	MH Fluid Cool					✓
✱	MWSeries	Recold MW Serie					✓
✱	NC84Tower	NC8400 Tower					✓
✱	NX10Tower	NX1000 Tower					✓
✱	PartsSearch	Marley Parts Search					✓
✱	Quadraflow	Quadraflow					✓
✱	Recon	Reconstruction Information					✓
✱	RTTower	RT Tower (rental)					✓

Adding Parts using Alt Search

Product Search



/ Creating a Proposal /

Adding Parts using Alt Search

Configurator

/ Creating a Proposal /

SAVE MY PARTS
SAVE
CANCEL

Parts Detail

Name

Description

Include	Quantity	Description	List Price	Buy / Resell	Lead Time	Ship Weight	Additional Text	Original Part
<input checked="" type="checkbox"/>	1	D47301 Tower model 1222 Fan Deck Replacement includes plywood fan deck, supports and hardware to install. Transverse girts are not included.	HQ				<input style="width: 100%;" type="text"/>	D47301

Use the checkmark to designate if you want to add each part to your quote

1

Click Save

3

Confirm quantity required of each part

2

Adding Parts using Alt Search

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

QUOTE DETAILS

New Save Undo Edit Copy Delete Preferences Logoff

SPX CT Request For Quotation

Phone: 800-322-6200 Fax: 913-664-7893 QTC Desk: 866-251-6634

Quote: Lori Hughes_160414_115347425	Opportunity: LORI HUGHES_160414_115347425
Quote Type: Part-Lbr	Description: Repairs
Sales Contact: Robert Swafford	Sales Office: SPX COOLING TECHNOLOGIES
Return EMail: Robert.Swafford@spx.com	Phone No.: UNKNOWN
Red Tag? <input checked="" type="checkbox"/> Yes	Subject: Customer Education

Reason for Red Tag status must be explained in the Message box below)

Message

Send Reset

RFQ CREATE NEW VERSION CALC DISCOUNTS REPRICE

RFQ

- > Material Only
- > Material and Labor
- > Estimate Labor RFQ
- > Labor Estimate Only (Must Complete Labor Conditions)

Type a detailed explanation of what you need or add into "Quote Notes"

Freight Term :

Incoterm Named

Place :

Carrier Type :

Manufacture : Headquarters

Point :

SPX Order # :

Original Manufacturer : Marley

Original Tower : sigma 1022

Model :

Original Order # : 104476

Won/Lost Explanation

Submit an RFQ to Parts Support

Quote Details

/ Creating a Proposal /

The screenshot shows the 'QUOTE ATTACHMENTS' section of the SPX Cooling Technologies web application. The interface includes a top navigation bar with icons for New, Save, Undo, Edit, Copy, Delete, Preferences, and Logoff. Below this is the 'Quote Information' section with fields for Quote Name and Description. The main area is an 'Upload Attachment' form with fields for Description, File Name, and User Access. A 'Choose File' button is present. A 'Choose file' dialog box is open, showing a file selection interface with a list of files and folders, including a 'Submission Folder.zip' file. A 'TASKS' sidebar on the left contains links for 'QUOTE ATTACHMENTS' and other quote-related functions.

1 Click on Quote Attachments

2 Click on New

3 Enter description of file

4 Click Choose file

5 Find and select the zipped folder you created, then click Open

6 RSM Note: Change User Access to SPX Users only for SPX internal documents

7 Click Save

Attaching Documents

Submit an RFQ to Parts Support

/ Creating a Proposal /

SPX Cooling Technologies
Lori Hughes

TUTORIALS

OPPORTUNITY

OPPORTUNITY SEARCH

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

QUOTE DETAILS

New
Save
Undo
Edit
Copy
Delete
Preferences
Logoff

<p>Quote Type : Part-Lbr</p> <p>Sales Influence :</p> <p>Anticipated Order Date : 04/14/2016</p> <p>Requested Ship Date : 09/16/2016</p> <p>Get Probability % : Total Probability %</p> <p>Reason Won/Lost :</p> <p>Freight Term : Prepaid S&H</p> <p>Incoterm Named Place :</p> <p>Carrier Type : SPX CT Choice - Standard Ground</p> <p>Manufacture Point : Headquarters</p> <p>SPX Order # :</p> <p>Change Order # :</p> <p>SPX Project # :</p> <p>Engineer :</p>	<div style="background-color: #002060; color: white; padding: 2px;">Opportunity Information</div> <p>Opportunity Name : LORI HUGHES_160414_115347425</p> <p>Description : Repairs</p> <p>End User : QTC Generic Company (USA)</p> <p>Potential Amount : 0.00</p> <div style="background-color: #002060; color: white; padding: 2px;">Parts, Recon, or Tower Replacement</div> <p>Original Manufacturer : Marley</p> <p>Original Tower Model : sigma 1022</p> <p>Original Order # : 104476</p> <div style="background-color: #002060; color: white; padding: 2px;">Won/Lost Explanation</div> <p>Ship To Contact : Credit Valley Hospital, (Company) 2200 Eglinton Ave W Mississauga, ON L5M 2N1 Canada</p>
--	---

Order will be placed with **Overland Park, KS, USA** based on Original Manufacturer and Sold-To company in **United States**.
Cost shown is **Overland Park, KS, USA** cost = Estimated **Headquarters** cost . No taxes or duties are included in this cost.

ADD PRODUCT
QUICK ADD PRODUCTS
ADD CUSTOM LINE ITEM
ADD FROM CONFIGURATION CART
CHECK AVAILABILITY
ADD MY PARTS
ADD FROM UPDATE
ADD FROM BEST

1 Click Add Custom Line Item

Adding a Labor Line Item

Quote Details

/ Creating a Proposal /

1 Enter a Line Item Name

2 Enter a description

3 List Price = "Sell price to the Customer"

4 Click Save

Name	Type	Override Group	Value
CustomFreightPrice	US Dollar	Freight	
Percent of Part Price to determine freight	Units PERCENT	Freight	
LaborDiscountPercent	Units PERCENT	LaborDiscount	
CustomPartUnitListPrice	CU3 US Dollar	ListPrice	

Adding a Labor Line Item

Custom Line Item

/ Placing an Order /

SPX Cooling Technologies
Lori Hughes

OPPORTUNITY DETAILS

QUOTES

LIST

QUOTE DETAILS

QUOTE ADJUSTMENTS

QUOTE ATTACHMENTS

LABOR CONSIDERATIONS

ORDER DETAILS

COMMISSION LIST

LINE ITEM DETAILS

LINE ITEM ADJUSTMENTS

TASKS

INFLUENCERS

SALES TEAM

SCHEDULE

COMPETITOR INFO

New Save Undo Edit Copy Delete Preferences Logoff

RFO CREATE NEW VERSION CALC DISCOUNTS REPRICE

Quote Information

HIDE

Quote Name : Lori Hughes_160414_133059933

Description : Repairs

Quote To / Sold To : QTC Generic Company (USA)

Quote Type : Part-Lbr

Sales Influence :

Anticipated Order Date : 04/14/2016

Requested Ship Date : 09/16/2016

Get Probability % : Total Probability %

Reason Won/Lost :

Freight Term : Prepaid S&H

Incoterm Named Place :

Carrier Type : SPX CT Choice - Standard Ground

Manufacture Headquarters

Engineer :

Generate Document

- Quote Summary
- Quote Summary**
- Quote Config Summary
- Cost Summary
- Matl & Other Cost Summary
- Cost Summary - Top Levels Only
- Inter-Company Cost Summary
- Inter-Company Cost Summary - Top Levels Only
- Hrs, Wts, Leadtimes
- Labor Summary
- Cost, Leadtimes, Taxes Summary
- Budget Summary
- Standard Bid
- Submittal

Opportunity Information

Opportunity Name : LORI HUGHES_160414_115347425

Description : Repairs

End User : QTC Generic Company (USA)

Potential Amount : 0.00

Parts, Recon, or Tower Replacement

Original : Marley

Manufacturer :

Original Tower : sigma 1022

Model :

Original Order # : 104476

Won/Lost Explanation

Ship To Contact : Credit

1 Use the Generate Documents drop down menu to select the document you require

2 Click the Generate icon to produce the document

If your document does not generate, you should re-check the settings outlined in the Initial QTC Setup document

Quote Details

SPX Cooling Technologies
Lori Hughes

ORDER DETAILS

NEW Save Undo Edit Copy Delete Preferences Logoff

Opportunity Information

Opportunity Name: LORI HUGHES_160414_115347425
 End User: [QTC Generic Company \(USA\)](#)
 Installation: No rep-HVAC&Ltlndus W Zone: Central (Miller)
 Territory:

Market: HVAC
 Application: Hospitals & Health Treatment
 Type: Reconstruction/Repair

Quote Information

Quote Name: Lori Hughes_160414_135059933
 Quote To / Sold To: [QTC Generic Company \(USA\)](#)
 Quote-To Territory: No rep-HVAC&Ltlndus W Zone: Central (Miller)
 Engineer:
 Ship To Contact: [Credit Valley Hospital, \(Company\)](#)

Quote Status: 4
 Order Type:
 Requested Ship Date:
 Original Order #:
 SPX Order #:
 Change Order #:
 SPX Project #:
 Reason Won/Lost:

Order Information

Sold-To PO #:
 Customer: Email only to
 Communications:
 Delivery Notify:

Sales Office PO #:
 Payment Terms: Use Customer Default
 Red Tag:

Order will be placed with Overland Park, KS, USA based on Manufacture Point Headquarters and Sold-To company in

Make sure the Market is set properly on the Opportunity (see above) so communications are assigned to the correct Regional Manager.

Order requires SPX review of the following issues:

Critical:
 Opportunity Details - End User Company is not in SAP.
 Quote Details - Sold To Company is not in SAP.
 Upon initial submittal notification will be sent to the appropriate SPX department.
 If confirmation of final order submittal with order number is not received within a reasonable time, please contact the appropriate SPX department.
 One or more data errors found during order audit. Correct all of the errors and then return to Order Details.

Opportunity Details - End User Company cannot be a generic company.
 Quote Details - Sold To Company cannot be a generic company.
 Quote Details - No Product Type assigned to line item. Please reprice quote.
 Quote Details - Reason Won/Lost is blank or invalid.

Show messages in floating window

- OPPORTUNITY DETAILS
- QUOTES
 - LIST
 - QUOTE DETAILS
 - QUOTE ADJUSTMENTS
 - QUOTE ATTACHMENTS
 - LABOR CONSIDERATIONS
 - ORDER DETAILS
 - COMMISSION LIST
 - LINE ITEM DETAILS
 - LINE ITEM
 - ADJUSTMENTS

- TASKS
- INFLUENCERS
- SALES TEAM
- SCHEDULE
- COMPETITIVE INFO
- COMPANIES
- CONTACTS

Click on Order Details page **1**

Once all order audits are gone, send an e-mail to Regional Sales Manager (RSM). Do not submit order. RSM to send E-mail to Angela Heffernon and Terry Hart.

You need to clear all of the issues shown in the Order Audit Window **2**

You can click on this link to keep the messages showing in a floating window while you navigate to the various screens to fix them **3**

Order Details