



Offers 1.11

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DAKOSY
Datenkommunikationssystem AG

Mattentwiete 2
20457 Hamburg
www.dakosy.de

+49 40 37003-0
info@dakosy.de

Alteration service

DAKOSY

Datenkommunikationssystem AG

Training team

Mattentwiete 2

20457 Hamburg

Telephone: +49 40 37003-0

E-Mail: dokumentation@dakosy.de

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Applicable documents und sources

in the respective valid versions

[1] the application's online help

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1 Offers

This section describes how to create and manage offers with the Offerten module. You can use offers to create offers for customer queries.

You can create offers for the types of transport seafreight and airfreight. Offer management offers the following functions:

- Use types of cost from the settlement settings for the calculation
- Create shipment from an offer, which creates the exit invoice automatically



Tip: To create exit invoices, you need the Invoicing module.

- Issue the offer as a pdf document
- Send cost approval query per email

1.1 Open offer

This section describes how to find and open an offer.

You need at least one of the following modules to use offer management:

- Module Invoicing
- Module Job Costing

1. Select the menu entry **Start > Offers**.

This opens the overview **Offers**.



Tip: To display only your own offers, click on the icon. To show the offers of all users at your company, click on the icon. To update the results list, click on the icon.

2. To open an offer, double click on the desired offer in the **Recently usedOffers** list.

1.2 Create offer

This section describes how to create an offer.

You need at least one of the following modules to use offer management:

- Module Invoicing
- Module Job Costing

1. Select the menu entry **Start > Offers**.

This opens the overview **Offers**.

2. In the area **Related actions**, click on the entry **Create offer**.
The window **DAKOSY GE (GE)** opens.

3. Select the **Transport Mode** and the **Direction of Trade** and enter the reference number of the offer.

This opens the **Offer** tab. The structure of an offer is similar to that of a shipment.

4. Fill out as many fields as possible.

The same fields are used for an offer as for a shipment. The additional fields are explained in the following list. Different fields are displayed depending on the selected **Transport Mode**.


Field	Description
Status	Status of the offer

Field	Description
Transport mode	Type of transport of the offer
Direction of Trade	Direction of transport of the offer. <ul style="list-style-type: none"> • Export • Import
Cargo Type	Order type of the transaction
Payment	Payment for transaction
Creation	Date on which an order was created
Valid from, to	<ul style="list-style-type: none"> • Date as of which the offer is valid. • Date until which the offer is valid.
Customer	Address of the customer
Ref.	Reference number
Contact	Information on making contact
Agent	Representative of the customer
Ref.	Reference number
Enquiry	Date on which subsequent query made with customer
Declined	Date on which the customer rejected the offer.
Commissioned	Date on which an order was created from the offer.
Reminder	Date when queries are to be made with the customer.
Reason	Reason for creating offer
Port of departure	Port of loading
discharge	UN/LOCODE of the port where the ship is discharged.
Advance Conveyance	Carrier lead time
Post Conveyance	Carrier stopping time

5. In the field **Language**, select the language in which business is conducted.
6. In the text fields **Subject**, **Textmodule address** and **Textmodule condition**, enter the texts for the pdf version of the offer.

Field	Description
Subject	Reference used in the pdf version of the offer.
Textmodule address	Form of address for the customer used in the pdf version of the offer. Enter a text or a remark code in capital letters with a preceding hash (#), for example #ANREDE .

Field	Description
Textmodule condition	General terms and conditions used in the pdf version of the offer. Enter a text or a remark code in capital letters with a preceding hash (#), for example #ANREDE .

 **Tip:** You can include the text blocks on the remark code. Click in the text field with the right mouse button and select **Search** in the context menu. If you know a remark code, you can enter this directly, placing a hash before it (#), for example **#ANREDE**.

- To add types of costs, open the tab **Calculation** and click on the **+** icon.
- Add the container and bulk cargo in the tab **Goods**.
- To save offers, click on the entry **Save** in the area **Actions**.

Change status of offer

- To change the status of the offer, click on one of the following items in the area **Related actions**:

Action	Description
Offer created	Changes the status of the offer to Created .
Offer commissioned	Changes the status of the offer to Commissioned .
Offer declined	Changes the status of the offer to Declined .
Offer reminder	Changes the status of the offer to Reminder .
Offer enquired	Changes the status of the offer to Enquired .


1.3 Print offer

This section describes how to print an offer.

You need at least one of the following modules to use offer management:

- Module Invoicing
- Module Job Costing

- Open an offer.
- Click on the entry **print** in the area **Actions**.
The window **Reprint: Print Offer** opens.
- Double click on the print template in the list **a Form Layout** which you wish to use for the offer.

 **Tip:** To create a new print template, contact servicedesk@dakosy.de.

The pdf is created and displayed.

1.4 Send charge approval mail

This section describes how to create and send a charge approval mail for an offer. You can use a charge approval mail, for example, to request approval from a line manager for charges incurred.

- Open an offer.
- In the area **Related actions**, click on the entry **Send charge approval mail**.
This opens the window **Send email**.
- Enter the consignee's email address. You can attach files to the email.
- To send the charge approval mail, click on the button **Send**.

1.5 Create shipment from an offer

This section describes how to create a shipment from an offer.



Important: Offer management is not developed to record long-term business relationships. You can only create a single shipment from an offer. To create another shipment from the offer, you must copy the offer.

1. Open an offer.
2. You now have the following options:
 - To create a shipment from the offer and include the outgoing vouchers, click on the entry **Create shipment and out voucher** in the area **Related actions**.
 - To create a shipment from the offer without including the outgoing vouchers, click on the entry **Edit shipment** in the area **Related actions**.



Important: If outgoing vouchers have been allocated to the offer, you do not have the Invoicing module and click on **Edit shipment**, the outgoing vouchers will not be included in the shipment.

The shipment is created. The reference number of the offer is included as the reference number of the shipment.

2 Contact information

You will find contact information in this section.

Questions on DAKOSY GE

- Contact partner: DAKOSY service desk
- Telephone: [+49 \(0\)40 3786 0990](tel:+49(0)4037860990)
- Email: servicedesk@dakosy.de
- [Contact form](#)