

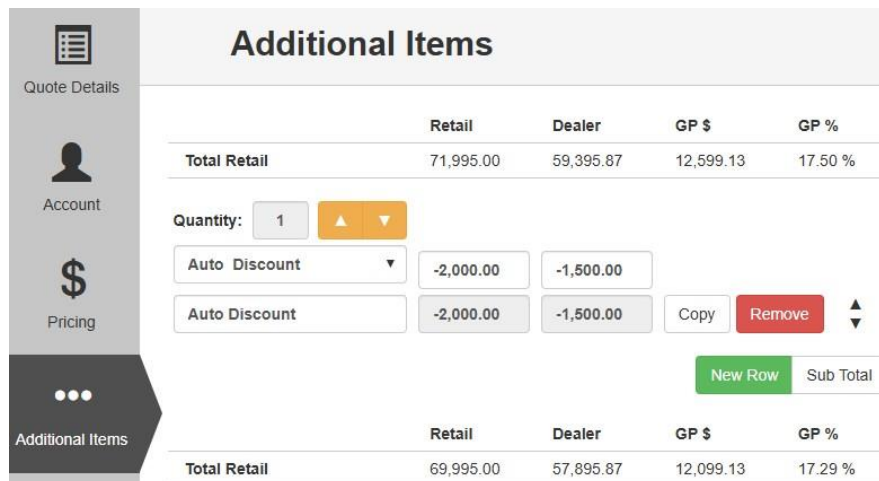
# Creating and Editing Additional Items

July 2025

# Pre-Populated Additional Items

- Additional Items can be added to quotes in HST to display discounts, freight charges, or other items added to quotes
- HFOs are able to enter pre-populated Additional Items in HST to make adding them to quotes faster
- This presentation explains the process to create and edit pre-populated Additional Items
- Note: only HFO designated HST Administrators have access to create and edit Additional Items

Additional Items section of a MO Quote

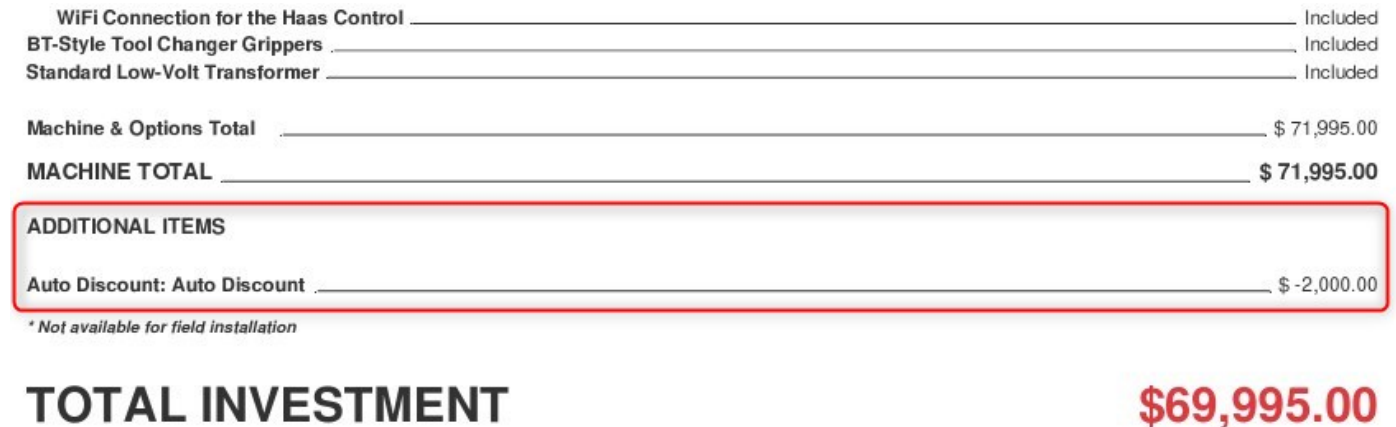


	Retail	Dealer	GP \$	GP %
<b>Total Retail</b>	71,995.00	59,395.87	12,599.13	17.50 %

	Retail	Dealer	GP \$	GP %
<b>Total Retail</b>	69,995.00	57,895.87	12,099.13	17.29 %

Additional Items on a quote PDF



WIFI Connection for the Haas Control \_\_\_\_\_ Included

BT-Style Tool Changer Grippers \_\_\_\_\_ Included

Standard Low-Volt Transformer \_\_\_\_\_ Included

**Machine & Options Total** \_\_\_\_\_ \$ 71,995.00

**MACHINE TOTAL** \_\_\_\_\_ \$ 71,995.00

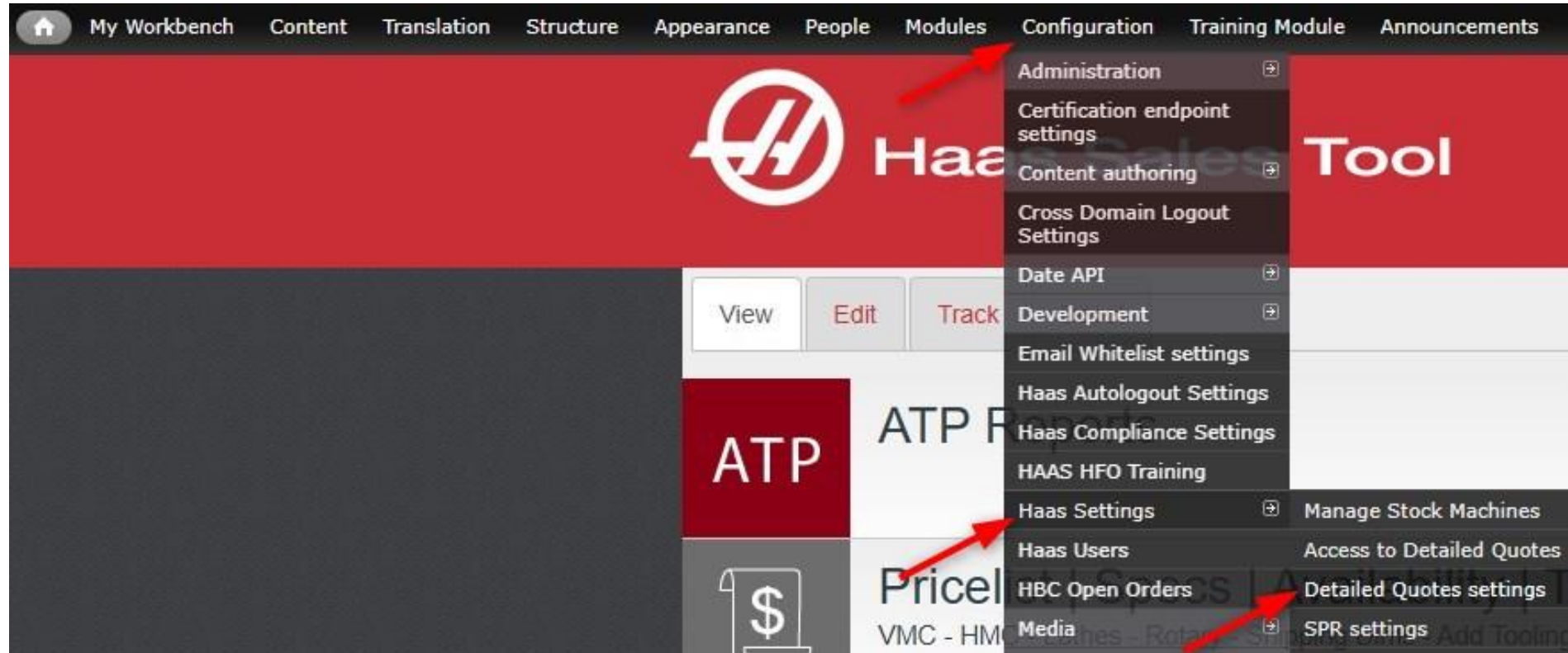
**ADDITIONAL ITEMS**

Auto Discount: Auto Discount \_\_\_\_\_ \$ -2,000.00

*\* Not available for field installation*

**TOTAL INVESTMENT** **\$69,995.00**

- From the HST homepage, scroll to the horizontal toolbar at the top of the screen and click Configuration > Haas Settings > Detailed Quotes Settings



- Scroll down to the Language section and click the 'Edit' button for the language in your region

Localized Settings

Language	Actions
Albanian	<a href="#">Add language</a>
Arabic	<a href="#">Add language</a>
Chinese, Simplified	<a href="#">Add language</a>
Czech	<a href="#">Add language</a>
Danish	<a href="#">Add language</a>
Dutch	<a href="#">Add language</a>
English	<a href="#">Edit</a> <b>DEFAULT</b>
Finnish	<a href="#">Add language</a>

- Scroll down to the 'Additional Items' section and click 'Get Additional Items CSV' to download the template for pre-populated Additional Items

## Additional Items

Name	Description
RIGGING	Local rigging is NOT included in this quote and will need to be coordinated directly by the buyer.
Reckart Freight	Cross country freight to a rigger of your choice
EDU	15% Discount on machine and options
EWCRECREDIT	Credit for second warranty
CSMDCred	Credit for HAAS control simulator module
CSMD	HAAS control simulator module

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[Get Additional Items CSV](#)

[Upload Additional Items CSV](#)

# Pre-Populated Additional Items

- Once the CSV file is downloaded, you can edit existing items or create new ones
- Name, Description, and Retail/Dealer discount fields will appear on the quote in HST
- Machine models can be entered in column E so that Additional Item will only appear in HST to be added for the specific machine models entered in that column
- To show a charge on the quote, enter a positive dollar amount
- To show a discount, enter a negative amount with (-) before the number
- If columns C/D are left blank, those fields can be edited on the quote in HST

	A	B	C	D	E
1	Name	Description	Retail	Dealer	Machine
2	Freight	Freight to a rigger of your choice	1500	1500	VF-1, VF-2, VF-2SS
3	EDU Discount	15% discount on the machine and options			
4	Promotion Discount	Discount for current promotion	2500	2000	VF-4, VF-4SS
5	Simulator	HAAS Control Simulator	1695	1695	CSMD-G2
6	Simulator Credit	Credit for free HAAS Control Simulator	-1695	-1695	

# Pre-Populated Additional Items

- Once your edits are complete, save the updated CSV file on your computer so it can be uploaded back to HST
- To upload the file, go back to the 'Additional Items' section of the quote settings page in HST, click 'Upload Additional Items CSV' and follow the prompts to upload a file

Additional Items

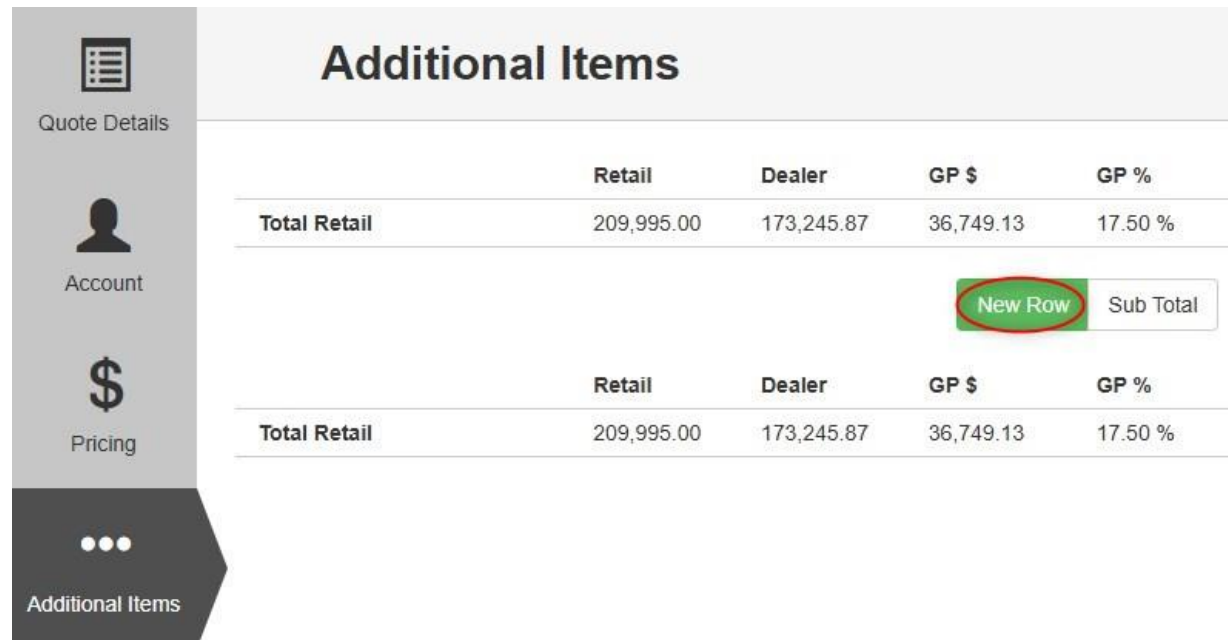
Name	
Demo Day 2018 Discount	Valid thru 5/11/2018
Lifetime Training and Support	Haas Lifetime Mill OR Lathe Training
Freight	from Oxnard CA to Customer
Freight	from Oxnard CA to Customer
Freight	from Oxnard CA to Customer
Freight	from Oxnard CA to Customer

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[Get Additional Items CSV](#) [Upload Additional Items CSV](#)

# Pre-Populated Additional Items

- Once the Additional Items file is uploaded, those pre-populated items can be selected from the Additional Items section of a MO Quote
- Start a quote, go to the Additional Items section, and click 'New Row'

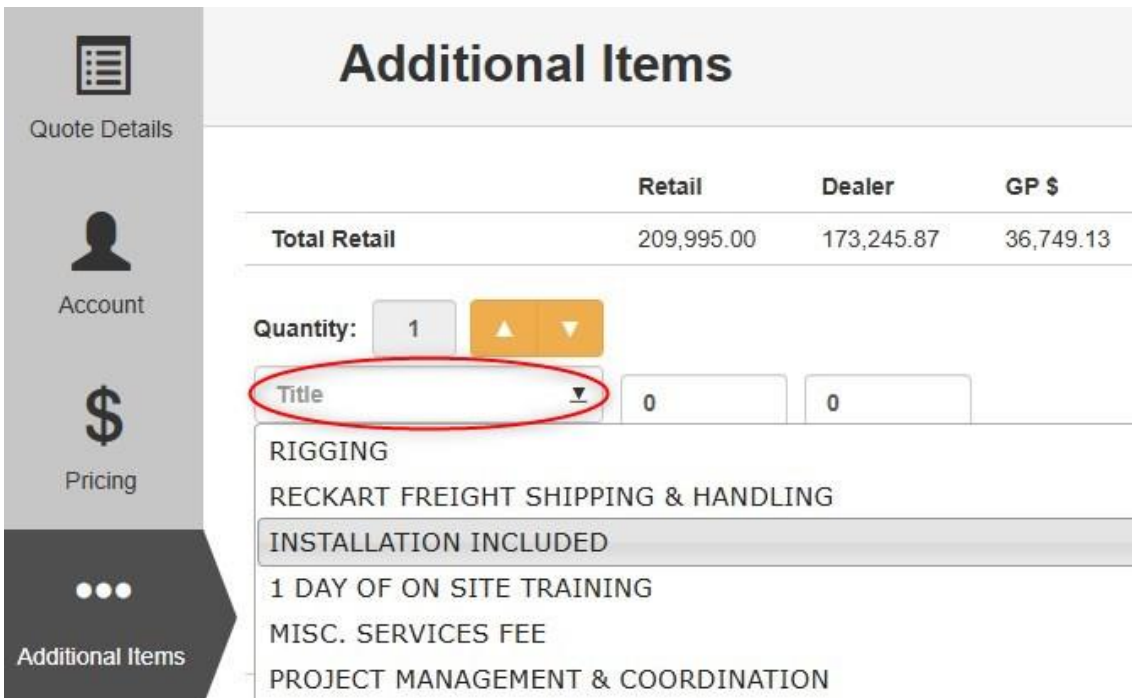


**Additional Items**

	Retail	Dealer	GP \$	GP %
<b>Total Retail</b>	209,995.00	173,245.87	36,749.13	17.50 %
			<b>New Row</b>	Sub Total
	Retail	Dealer	GP \$	GP %
<b>Total Retail</b>	209,995.00	173,245.87	36,749.13	17.50 %

# Pre-Populated Additional Items

- Click the dropdown menu to view the pre-populated Additional Items
- Select one to add it to the quote
- The item name, description, and price fields can be edited if needed
- Once done, save the quote and proceed with the quote process



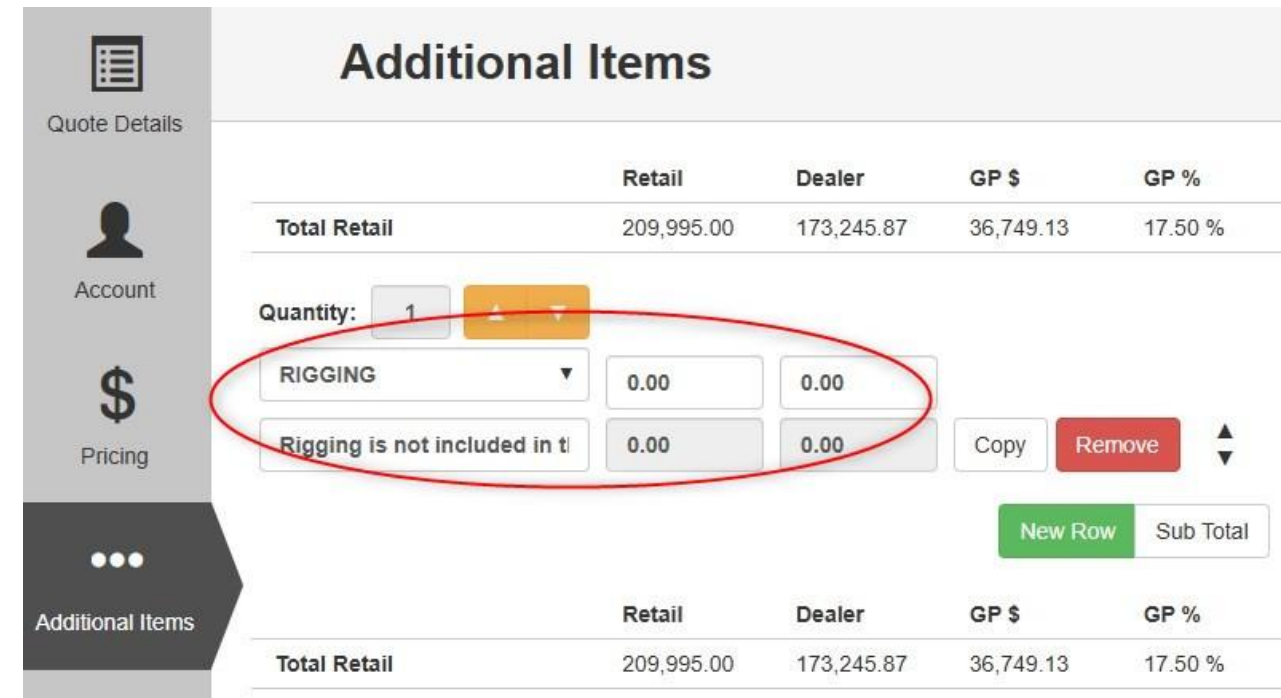
**Additional Items**

	Retail	Dealer	GP \$
<b>Total Retail</b>	209,995.00	173,245.87	36,749.13

Quantity: 1

Title

- RIGGING
- RECKART FREIGHT SHIPPING & HANDLING
- INSTALLATION INCLUDED
- 1 DAY OF ON SITE TRAINING
- MISC. SERVICES FEE
- PROJECT MANAGEMENT & COORDINATION



**Additional Items**

	Retail	Dealer	GP \$	GP %
<b>Total Retail</b>	209,995.00	173,245.87	36,749.13	17.50 %

Quantity: 1

RIGGING

Rigging is not included in t

Copy Remove

New Row Sub Total

	Retail	Dealer	GP \$	GP %
<b>Total Retail</b>	209,995.00	173,245.87	36,749.13	17.50 %