

SALES

CUSTOMERS - QUOTES

The **Quotes** tile direct you to the Sales Quotes listing screen for a selected Customer.

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the Site where the customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* for the customer.
 - The example has *Active* selected.
- Select the *row* of the *customer* whose sales quotes you wish to work with.
- 5. Click on the *Quotes* tile.



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- 6. The *Sales Quotes for Customer [customer code]* screen will display.
- 7. All the quotes for the selected customer will be listed.
- 8. The *Site* filter on this screen gives you the ability to change the site for the selected customer, where the customer has multiple sites.

ADD QUOTE

9. Click on *Add*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Add*.



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- 10. "The Add new Customer Quote screen will display. " on page 2
- You have the option to *Apply a Sales Template* or *Apply a Project Methodology* to the new sales quote.
- 12. Click *Save* to save the quote as a New Quote and return to the *Customer Listing* screen.



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EDIT QUOTE

Only Quotes with a *N* - *New Quote* in the Quote Status column can be edited.

- 1. Select the *row* of the Sales Quote you wish to edit.
- 2. Click on *Edit*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.



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- "The Edit Customer Quote QT[quote number] screen will display." on page 2
 - You have the option to Apply a Sales Template and Apply a Project Methodology to the already created sales quote.
 - Make changes to the *Heading Information* or to Items in the *Sales Items grid*.
- Click on *Save* to save the changes to the Sales Quote and return to the *Customer Listing* screen.



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DELETE QUOTE

Only Quotes with a *N - New Quote* in the Quote Status column can be deleted.

- 1. From the Sales Quotes for Customer [customer code] listing screen,
- 2. Click on the *row* of the Sales Quote you wish to *remove*.
- 3. Click on *Delete*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Delete*.

- 4. When you receive the *Confirm delete quote* message to confirm;
 - Are you sure you want to delete this quote?
- 5. Click on **Yes** if you are certain about your selection.



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The Sales Quote will be *removed* from the *Sales Quotes for Customer* listing screen.

VIEW QUOTE

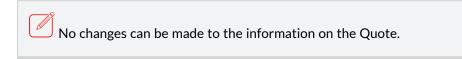
A Quote in any Quote Status can be Viewed.

- 1. From the *Sales Quotes for Customer [customer code]* listing screen,
- 2. Click on the *row* of the Sales Quote you wish to *view*.
- 3. Click on *View*



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	QT0000029	TIA001	Titan Group	Part Request ch	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		I	A	
	QT0000032	TIA001	Titan Group	test	1,154.27	ZAR	1.00	14.00	05/08/2014	Belinda Sharm		I	A	
	QT0000034	TIA001	Titan Group	Parts not includ	5,721.38	ZAR	1.00	14.00	20/08/2014	Belinda Sharm		I	A	
	QT000038	TIA001	Titan Group	CO 1234	3,448.52	ZAR	1.00	14.00	11/11/2014	Belinda Sharm	Machine install	I	Α	
	QT0000211	TIA001	Titan Group	1234	9,009.28	ZAR	1.00	15.00	02/03/2018	Bianca Du Toit		I	A	
۲	QT0000228	TIA001	Titan Group	test	920.00	ZAR	1.00	15.00	26/06/2018	Bianca Du Toit		R	A	
	QT0000238	TIA001	Titan Group	Copy of test	920.00	ZAR	1.00	15.00	26/06/2018	Bianca Du Toit		I	A	
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4. The *View Customer Quote - QT[quote number]* screen will display.



5. Click on *Back* to return to the *Sales Quotes for Customer* listing screen.



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FORWARD NAVIGATION

The *Forward* navigation button is only available in the *Invoiced Quote* status after the Sales Quote has been Converted to Order. This feature enables the user to quickly navigate to related documentation. You can navigate to the Sales Orders listing screen where you can view the Sales Order that has been created from the selected Sales Quote.

- 1. Change the Status to *Invoiced Quote* to display a list of all invoiced quotes.
- 2. Click on the *row* of the Invoiced Quote that you wish to view.
- 3. Click on *Forward* to navigate to the Sales Orders listing screen.
 - If the Forward navigation is available (not greyed out) then further downstream process documents related to the selected order is available and you can thus navigate to those



downstream documents, e.g. the linked **Sales Invoice**, the new deal **Call** or **Project**.

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QT0000238	TIA001	Titan Group	Copy of test	920.00		1.00	15.00	26/06/2018	Bianca Du Toit	-	I	A	
QT0000023	DER001	Derton / Technologies	test	21,208.86		1.00		03/07/2014	Belinda Sharm		I	A	
OT0000215	HOP001	Hope Works (Ptv) Ltd	New Deal Rental	14,196.75		1.00		14/03/2018	Bianca Du Toit	test	1	A	
QT0000092	HOP001	Hope Works (Pty) Ltd		4,745.59		1.00		03/11/2016	Bianca Du Toit		I	A	
OT0000138	HOP001	Hope Works (Pty) Ltd	Generate Order	6,156.00		1.00		25/05/2017	Bianca Du Toit		I	A	
QT0000161	PAN001	Panda Copiers		44.96	USD	10.00		07/08/2017	Bianca Du Toit		I	A	
QT0000029	TIA001	Titan Group	Part Request ch	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		I	A	
QT0000221	APP0001	Apple Juice Inc	C copy Test sou	81.94	ZAR	1.00	15.00	29/05/2018	Belinda Sharm		I	A	
QT0000075	BIG0001	Big Bargains	1557788	1,140.00	ZAR	1.00	14.00	09/08/2016	Bianca Du Toit		I	A	
QT0000201	HOP001	Hope Works (Pty) Ltd	toner	984.96	ZAR	1.00	14.00	17/11/2017	Bianca Du Toit		I	A	
QT0000015	WES001	Westwood Dynamic	COR 118596	45,894.06	ZAR	1.00	14.00	02/07/2014	Belinda Sharm	Installation - 2	I	A	
QT0000009	HOP001	Hope Works (Pty) Ltd	Test Project Me	1,801.94	ZAR	1.00	14.00	30/06/2014	Belinda Sharm	test project m	I	Α	
QT0000195	HOP001	Hope Works (Pty) Ltd	1234	34.20	ZAR	1.00	14.00	30/08/2017	Bianca Du Toit		I	A	
QT000003	YES001	Young Electric	abc123	16,769.40	ZAR	1.00	14.00	06/05/2014	Karlien Jessic		I	Α	
QT0000052	HOP001	Hope Works (Pty) Ltd	test	4,674.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm		I	Α	
QT0000066	DER001	Derton / Technologies	test cross refer	1,000.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm		I	Α	
QT0000218	HOP001	Hope Works (Pty) Ltd	test	483.00	ZAR	1.00	15.00	23/04/2018	Bianca Du Toit	test	I	Α	
QT0000032	TIA001	Titan Group	test	1,154.27	ZAR	1.00	14.00	05/08/2014	Belinda Sharm		I	A	
QT0000026	HOP001	Hope Works (Pty) Ltd	Test Edit Sales	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		I	Α	
QT0000012	OFF001	Office Supplies Unlimited	OR 14789	950.49	ZAR	1.00	14.00	02/07/2014	Belinda Sharm		Ι	A	
QT0000035	DER001	Derton / Technologies	test	285.00	ZAR	1.00	14.00	25/09/2014	Belinda Sharm		I	A	

BACK NAVIGATION

4. The *Back* navigation button is available and by clicking on it will allow you to navigate back until you return to the *Sales Quotes* listing screen.



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	OR0000207	NET001	Networking and Lapto	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:10:42		
	OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10	ZAR	14/08/2017	Bianca Du Toit	1.00	1.00	11:18:17		
	OR0000220	BET0001	Betties Summer Shop	New order	1234	23,029.07	ZAR	21/08/2017	Bianca Du Toit	1.00	14.00	11:49:29		
	OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Bianca Du Toit	1.00	14.00	14:49:36		
	OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Bianca Du Toit	10.00	0.00	02:50:18		
	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26		
	OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30		
۲	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR0000297	NEW 101	New Customer Test	New order	test	150.00		17/09/2019	Bianca Du Toit	1.00		10:46:59		
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00		07/04/2020	Kame Pillay	1.00		12:31:21		
	OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60		09/04/2020	Kame Pillay	1.00		16:35:25		
	OR0000304	OFF001	Office Supplies Unlimit		test 1	12,333.75		14/04/2020	Sne Ndwalane	1.00		10:27:06		
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00		14/04/2020	Kame Pillay	10.00		11:59:51		
	OR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
4														

ACCEPT QUOTE

Only quotes with a *N - New Quote* in the *Quote Status* can be Accepted.

- 1. From the Sales Quotes for Customer [customer code] listing screen,
- 2. Click on the *row* of the Sales Quote you wish to *accept*.
- 3. Click on *Accepted*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Accepted*.

- 4. The *Input Validation* message screen, will prompt for your response;
 - Are you sure you want to update this quote, no. [] to be Accepted? Answer 'Yes' to mark it as Accepted.
- 5. If you are sure of your selection, click *Yes* to proceed.



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The Quote Status for the selected Quote has changed to **[A] - Accepted** on the **Sales Quotes for Customer** listing Screen.

REJECT QUOTE

A quote can be rejected from the *Sales Quotes for Customer* [] listing screen where the Quote Status is set to [*N*] - *New Quote* or [*A*] - *Accepted*.

- 1. From the Sales Quotes for Customer [customer code] listing screen,
- 2. Click on the *row* of the Sales Quote you that needs to be *rejected*.
- 3. Click on *Rejected*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Rejected*.

- 4. The *Input Validation* screen, will prompt your response;
 - Are you sure you want to update this quote, no. QT[quote number] to be Rejected? Answer 'Yes' to mark it as



Rejected.

5. If you are sure of your selection, click **Yes** to proceed.

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2 uutomer Titan Group to be Rejected? Answer 'Yes' to mark it as Rejected.	QT0000238	TIA001		it fundation					2018	Bianca Du Toit		I	A
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The Quote Status for the selected Quote has changed to **[R] - Rejected** on the **Sales Quotes for Customer** listing Screen.

CONVERT QUOTE TO ORDER

A quote can be converted to a sales order from the *Sales Quotes for Customer* [] listing screen where the Quote Status is set to [*N*] - *New Quote* or [*A*] - *Accepted*.

- 1. From the Sales Quotes for Customer [customer code] listing screen,
- Click on the *row* of the Sales Quote that you wish to *convert* to a sales order.
- 3. Click on *Convert Order*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Order*.



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You will receive *three (3)* prompt messages to confirm the transaction:

First Order Generation message

4. The *Order Generation* message will prompt for your response;

• Are you sure you want to convert quote QT[quote number], for Customer [customer code] to an order?

5. Click on Yes, if you are certain about your selection.

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	QT0000083	BOT0001	Bothas Networking inc	test forex with t	133.87	USD	10.00	14.00	25/10/2016	Bianca Du Toit		I	A
	QT0000096	BOT0001	Bothas Networking inc		525.66	USD	10.00	14.00	10/11/2016	Bianca Du Toit	Test	N	A
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T	QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00	14.00	11/11/2016	Bianca Du Toit		I	A
t	QT0000100	BOT0001	Bothas Networking in	order Generation <					×	Judith Mudzengi		N	A
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	QT0000190	BOT0001	Bothas Networking inc							Bianca Du Toit		N	A
	QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A
	QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A

Second Order Generation message

- 6. The *Order Generation* message will prompt for confirmation;
 - Do you wish to close the quote QT[quote number] off? No further orders will be possible from this quote if it is closed.
- 7. If you are sure of your selection, click **Yes** to proceed.



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QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	Α
QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A

Third Order Generation message

- 8. The Order Generation message will next prompt you;
 - Do you wish to view the order created, no. OR[order number]?
- 9. Click Yes to view the order.
 - Selecting No will leave you on the Sales Quotes for Customer screen.



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	QT0000100	BOT0001	Bothas Networking inc					1	/2017	Judith Mudzengi		N	A
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	QT0000170	BOT0001	Bothas Networking inc						/2017	Bianca Du Toit		N	A
	QT0000172	BOT0001	Bothas Networking inc						/2017	Bianca Du Toit		N	Α
	QT0000177	BOT0001	Bothas Networking inc	0-			Yes	No	/2017	Bianca Du Toit	USD, 14, 10, I	N	A
	QT0000190	BOT0001	Bothas Networking inc						/2017	Bianca Du Toit		N	A
	QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A
	QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A

The *Sales Orders* listing screen will display the a list of all *New Orders* for the *Site* you have selected.

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(DR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
(0R0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
(DR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
(DR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
(DR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
(DR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		
(DR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
(DR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
(R0000302	PIN0001	Pink Shoes	New order	test email	724,895.60	ZAR	08/04/2020	Kame Pillay	1.00	15.00	09:51:43		
(DR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
(DR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
(DR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
(DR0000307	PIN0001	Pink Shoes	New order	new quote1	245,525.00	ZAR	21/04/2020	Kame Pillay	1.00	15.00	14:25:03		
(DR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
(DR0000309	PIN0001	Pink Shoes	New order	new order	115.00	ZAR	23/04/2020	Kame Pillay	1.00	15.00	01:50:39		
(DR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
(DR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
(DR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		



For a detailed handling of this topic refer to Quotes - Convert to Sales Order

CLONE A QUOTE

The nature of cloning a quote is to *save time* when creating new quotes for customers. Using this method, ensures that most of the details of the quote would remain the same. You may wish to *edit* some of the details, for example, the customer, the discount amount or *add* items such as a warranty to the quote.

- 1. From the *Sales Quotes for Customer [customer code]* screen,
- 2. Select the *row* of the quote you wish to clone.
- 3. Click on *Clone Quote*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Clone*.

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	QT0000018	BOT0001	Bothas Networking inc	test	74,999.88	ZAR	1.00	0.00	03/07/2014	Belinda Sharm		I	A
	QT0000083	BOT0001	Bothas Networking inc	test forex with t	133.87	USD	10.00	14.00	25/10/2016	Bianca Du Toit		I	A
	QT0000096	BOT0001	Bothas Networking inc		525.66	USD	10.00	14.00	10/11/2016	Bianca Du Toit	Test	N	A
	QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	A
	QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00	14.00	11/11/2016	Bianca Du Toit		I	A
_	QT0000100	BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A
-	QT0000160	BOT0001	Bothas Networking inc		46.61	USD	10.00	0.00	07/08/2017	Bianca Du Toit		I	A
	QT0000163	BOT0001	Bothas Networking inc	test	71.25	USD	10.00	0.00	07/08/2017	Bianca Du Toit		I	A
	QT0000169	BOT0001	Bothas Networking inc	test	66.12		10.00	0.00	08/08/2017	Bianca Du Toit		N	A
	QT0000170	BOT0001	Bothas Networking inc	crm	6.61		10.00		08/08/2017	Bianca Du Toit			A
	QT0000172	BOT0001	Bothas Networking inc	USD zero vat ex	51.75	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	A
	QT0000177	BOT0001	Bothas Networking inc	USD, 14, 10, IT	2,832.42		10.00		10/08/2017		USD, 14, 10, I		A
	QT0000190	BOT0001	Bothas Networking inc		533.63		10.00		15/08/2017	Bianca Du Toit			A
	QT0000275	BOT0001	Bothas Networking inc	test	2,715.00		10.00		30/07/2019	Bianca Du Toit			A
	QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A



4. The *Add new Customer Quote* screen will display.

It is important that a <u>new</u> *Reference* is entered as it is used to find and identify the quote once it has been processed.

- 5. You can edit any of the *Customer Heading*, *Financial Heading* or *Cross Reference* details, if required.
- 6. Edit any *Item details*, if required.
- You can also choose to apply a *Sales Template*, which will be appended to the existing quote items, and / or apply a *Project Methodology* to the cloned quote, if required.

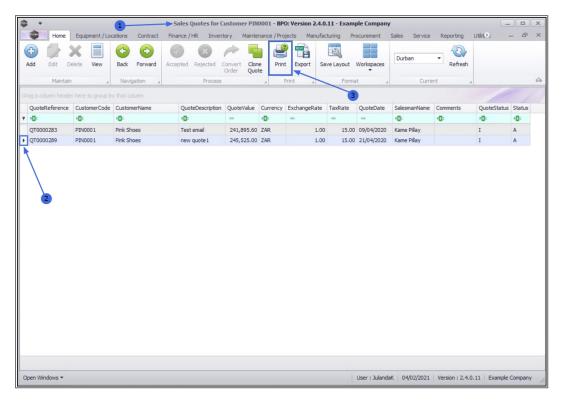
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_		Sub Contracts	INST	Installation Fee		1.000	0.00	0	350.000	0.000	0.000	9.000	
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For a detailed review of this procedure click on the link to redirect to <u>Quotes</u> - <u>Clone a Quote</u>.



PRINT QUOTE

- 1. From the Sales Quotes for Customer [customer code] listing screen,
- 2. Click on the *row* of the Quote you wish to print.
- 3. Click on **Print**.



- 4. The *Select the option as desired* message screen will display.
- 5. Click on the *radio button* of the option you require.

When selecting to *Email the Quote*, the quote will be emailed via the *BPO Email Service* on the server (not from MS Outlook).

- The example has *Print Quote* selected.
- 6. Click *Accept* to proceed.



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- 7. The Sales Quote will display in the *Preview* screen.
- From here you can make cosmetic changes to the document, as well as Save, Print, Export, Add a Watermark or Email the Sales Quote.
- 9. Click *Close* to return to the *Sales Quotes for Customer* screen.





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