

## **SALES**

## **QUOTES - APPLY PROJECT METHODOLOGY**

When a Project Methodology is applied to a quote, the system will generate **sub projects** and **work orders** as set up in the **methodology layers**, once the quote has been converted into a New Deal Project.

If **resource requirements** were specified, then these will be requested.

A single- or multiple methodologies can be applied to a quote.

Both Methodologies and Sales Templates can be applied to the same sales quote.

Ribbon Access: Maintenance / Projects > Projects

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	Equipment / Locations	Contract	Finance / HR.	Inventory Ma	aintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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- 1. The *Sales Quotes* Listing screen will be displayed.
- 2. Select the *Site* where the quote can be located.
  - The example has *Durban* selected.
- 3. Ensure that the *Status* has been set to *New Quote*.
- 4. Click on the *row* of the quote you wish to apply a Methodology to.
- 5. Click on *Edit*.

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



## Quotes - Apply Project Methodology

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QT0000086	APP0001	Apple Juice Inc	iouyhkj	8,347.60	ZAR	1.00	14.00	01/11/2016	Belinda Sharm		N	Α
QT0000087	BET0001	Betties Summer Shop at	test	599.26	ZAR	1.00	14.00	01/11/2016	Belinda Sharm		N	A
QT000088	HOP001	Hope Works (Pty) Ltd		1,112.00	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	Α
QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	Α
QT0000090	HOP001	Hope Works (Pty) Ltd		91,651.06	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		N	Α
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QT0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	Α
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QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		Ν	Α
QT0000099	HOP001	Hope Works (Pty) Ltd	QT0000099	4,172.40	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	Α
QT0000100	BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	Α

- 7. The *Edit Customer Quote QT[quote number]* will be displayed.
- 8. Click on the *Methodologies* tab to view any project methodologies that have already been linked.
- 9. Click on Apply Project Methodology.



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- 10. The *Select the methodology to apply* screen will display.
- 11. Click on the *row* of the Project Methodology you wish to apply to the quote.
- 12. Click on *OK*.



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- The Quote will be updated and the tasks defined by the methodology will be appended to any existing quote items that have already been created.
- 14. The *Methodologies frame* has also been updated with the Methodology information selected.
- 15. You may now proceed to edit Quote Item(s) or "Delete Quote Item" on page 9(s) as required.
- When done editing the Quote, click on *Save* to return to the Sales Quotes listing screen.



## Quotes - Apply Project Methodology

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	Parts	2020-147C	Cyan toner SP2020	Main Warehouse	1.000					
	Parts	2020-147Y	Yellow toner SP2020	Main Warehouse	1.000					
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	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000					
	Parts	SP19-147K	Black Toner SP1919	Main Warehouse	1.000					
	Parts	SP19-147K	Black Toner SP1919	Main Warehouse	1.000					
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