

# SERVICE

## CALLS - ADD A QUOTE

You may need to raise a quote for additional work that must be done, but needs approval from the client, as it will be billed.

Once the client has approved the quote, it can be processed further:

- Convert to Sales Order
- Add Items to WO

Ribbon Access: Service > Calls



The *Call Listing* screen will be displayed.



- Select the *site* and *status*.
  - In this image, *Durban* has been selected as the site and the status has been set to *New*.

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## **SELECT THE CALL**

- Click on the *row selector* in front of the *call* you wish to raise a *quote* for.
- Click on *Edit*.



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## **ADD A QUOTE**

The *Call maintenance: Call ref. - []* screen will be displayed.

• Click on the *Quotes* tile.



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The *Sales Quotes for Call []* screen will be displayed.

• Click on Add.

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The Add new Customer Quote screen will be displayed.



#### **CUSTOMER INFO**

- **Customer:** This will auto populate with the customer linked to this call.
- **Contact Name:** This will auto populate with the contact linked to this call but you can click on the search button and select an alternative contact if required.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required.
- **Salesman:** This will auto populate with the person currently creating the sales quote but you can click on the search button and select an alternative salesman if required.
- **Reference:** Type in a reference for the quote.
- **Status:** This will auto populate as New quote.
- **Date and Time:** These will auto populate with the current date time but
- You can either type in or click on the drop down arrow and use the calendar function to select an alternative date if required.
- You can either type in or use the arrow indicators to select an alternative time if required.



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#### **FINANCIAL INFO**

- **Currency:** This will populate based on the currency set up on the customer. Use the drop down arrow to display the currency menu and select a different currency if required.
- **Tax Rate:** This will populate based on the tax rate set up on the customer. Click on the search button and select an alternative rate if required.
- Exchange Rate: This will populate based on the currency set up on the customer. Type in or use the directional arrows to select a new rate if required.



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#### **CROSS REFERENCES**

• This frame will populate with the Call Reference No. as this sales quote is being raised from a *call*. The Serial No. and Contract No. fields will also auto populate if applicable.



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#### COMMENTS

• Type in a *comment* for this quote if required. This comment will appear on the *sales quote document*.

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#### **QUOTE ITEMS**

- Click on the quote *Item Type* text box to reveal a drop down arrow.
- Click on this arrow to bring up the *Item Type* menu.
- Select from this menu, one of the following;
  - CRFT (Labour craft, i.e. Technician)
  - CTRT (Third Party Labour/Service)
  - **EXPS** (Expenses)
  - INVN (Part)
  - SERV (Internal Labour/Service)
  - TRVL (Travel)
  - WARR (Warranty sale)
  - OTHR (Type in any additional items to quote, but this will *not* be pulled over when quote is converted to a sales order. If quote is confirmed, this item can be set up as a part / service and linked to the quote in it's place).
- In this image *Parts* has been selected.



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- Click on the quote *Item Code* text box to reveal an *ellipsis* button.
- Click on this button to bring up the *Select a part* menu.
  - Note: The 'Select a [...]' screen displayed, will be according to the *Item Type* initially selected i.e. if
     Labour had been initially selected then a Select a craft screen would pop up.



Salesman         Munda Kessler         •           Currency         South African Rand         •         Exchange Rate         1.00         •         CALL         Call Reference         ·	Home Home Back App Customer Hame Contact Name Commercial	Equipment / Locati Div Sales Apply Pro- Methodo Maintain Big Bargare Tarryn Snow CUST( Type Class Commen	ions Contract	Add new t Finance / HR Save Layout Format Print	Customer Qu Inventory CQ002 New Quote 17/05/2022	viote - BPO: Version Maintenance / Proj 13:26:40	a 2.5.0.8 ects M	- E	RefType QUOT ASMN	ny v2.5.0.8 ocurement S ReferenceType Work Order Refi Sales Quote Serial No	ales Se	rvice Re eferenceNo	porting l	Jtilities	- 8	X X & Methodologie
Comment Sub Total 990.00	Salesman Currency Tax Rate SuppressOnPrint P	Julanda Kessler South African Rand 15.00 QuoteItemType = Parts Select type	ItemCode Q aC al CHA001 C	Exchange Rate		1.0 WarehouseName *©: Main Warehouse	Quantity	/	CALL CTRT PMING QuantityPerUOP = 0.0	Call Reference Contract No Project Reference UnitType #@c 00	ce UnitCost = 0.000	Markup = 0.000	Discount = 0.000	ItemPrice = 980.000	BaseCcyP = 98	rice
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- Click on the *row selector* in front of the *part* you wish to *add* to this quote.
- Click on Ok.

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- The *Quote Item Description* and *Warehouse Name* fields will auto populate once you have selected the *Item Code*.
- Edit the *Quantity*, *Discount* and *Item Price* as required by clicking in each of their text boxes and either using the *directional arrows* or *typing* in the correct amounts.
  - Note: To *add* in a new line, click on the last text box in the row and press the *Enter* key.

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## **SAVE QUOTE**

• When you have finished adding the details to this screen, click on *Save*.





You will return to the *Sales Quotes for Call* [] screen where you can *view* the details of the newly created *sales quote*.



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## **PRINT QUOTE**

- In the *Sales Quotes for Call []* screen, click on the *row selector* in front of the *quote* that you wish to *print*.
- Click on *Print*.

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• A *Select the option as desired* screen will pop up with print and email choices.



- Click on *Print Quote*.
- Click on *Accept*.

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The *Report Preview* screen will be displayed.

- From here you can View, Print, Export or Email the sales quote.
- *Close* the Report Preview screen when done.



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