PROJECTS

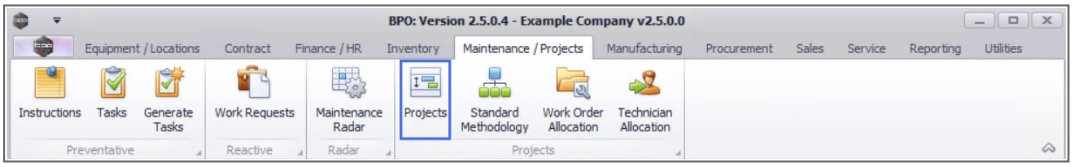
PROJECTS - QUOTES

You may need to raise a quote for additional work that needs be done. Approval from the customer is required, as the customer will be billed.

Once the customer has approved the quote, you then need to;

- Orders - Convert to New Deal Sale / Rental
- Add Items to WO

Ribbon Access: *Maintenance / Projects > Projects*



1. The ***Project Listing*** screen will be displayed.
2. Select the ***Site***.
    - The example has ***Durban*** selected.
3. Change the ***Status*** to ***Open***.
4. Click on the ***row*** of the ***project*** that you wish to create a quote for.
5. Click on the ***Quotes*** tile.

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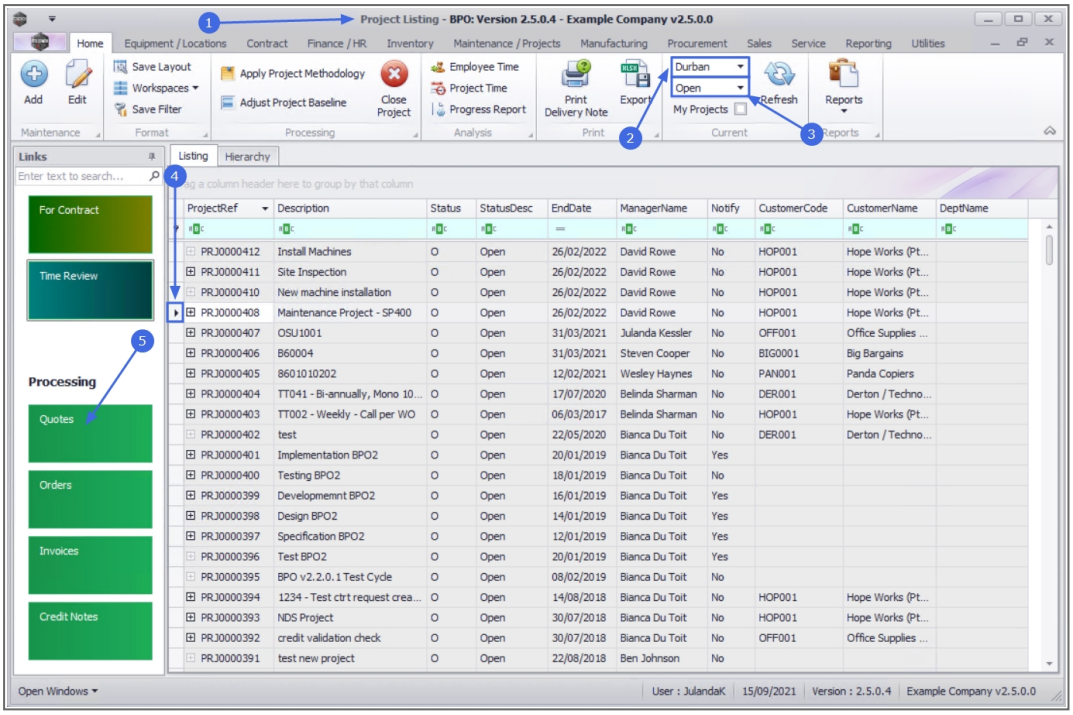

6. The ***Sales Quotes for Project [****project ref number****]*** listing screen will be displayed.
7. Any quotes that have already been created for the project will be listed on this screen.

ADD QUOTE

8. Click on ***Add***.

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

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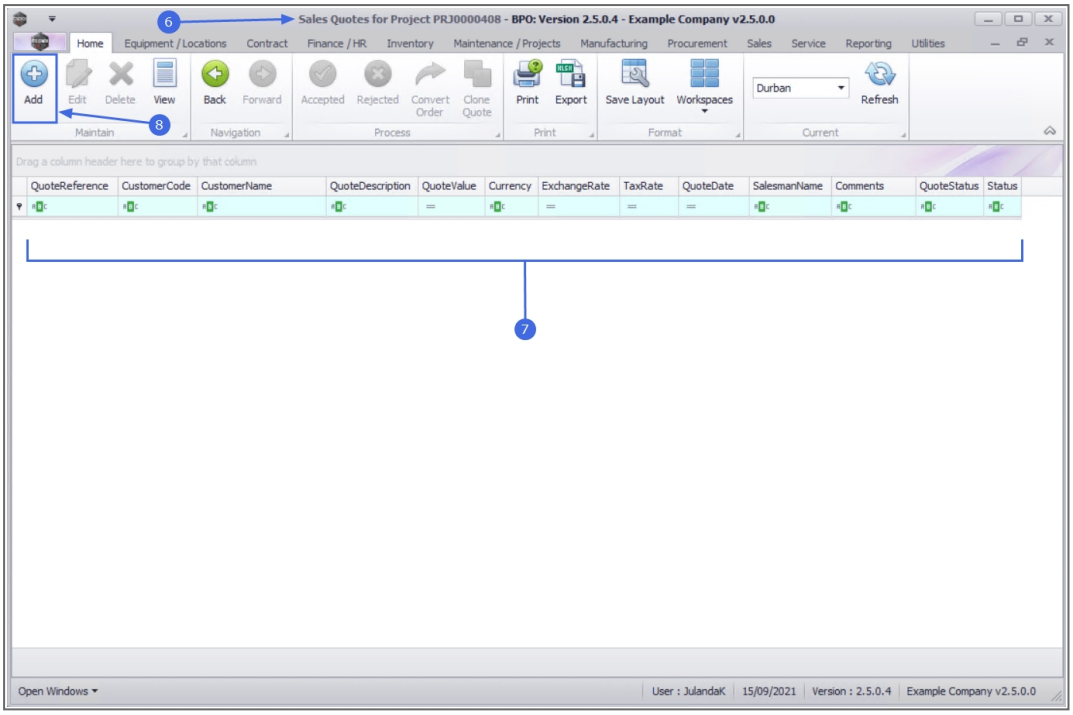

9. "The Add new Customer Quote screen will display. " on page 2
10. You have the option to Quotes - Apply Sales Template or Projects - Apply Project Methodology to the new sales quote.

CROSS REFERENCE

11. This frame will display all the ***linked references*** linked to this project, e.g. call number, serial number.
12. When a quote is created for a project from the Project Listing screen, then the ***Project Reference*** number will be auto linked to the quote.
13. When you have completed the quote information, click on ***Save***.

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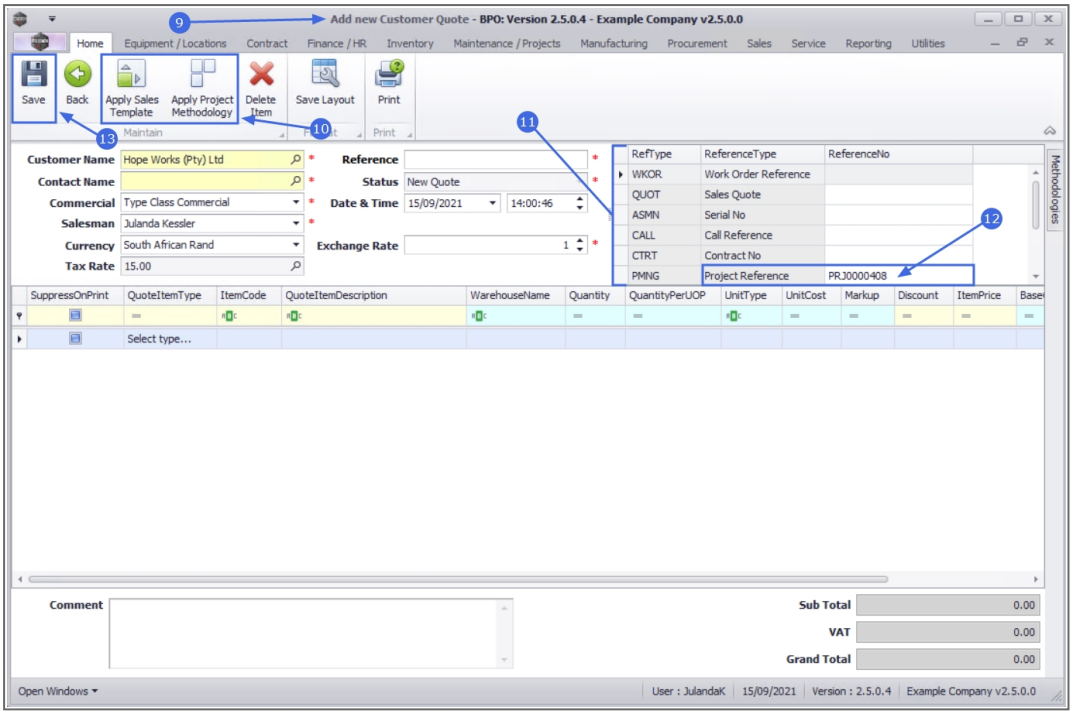

You will return to the ***Sales Quotes for Project*** listing screen.

EDIT QUOTE

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

1. From the ***Sales Quotes for Project*** *[project ref number]* listing screen,
2. Click on the ***row*** of the Quote you wish to make changes to.
3. Click on ***Edit***.

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

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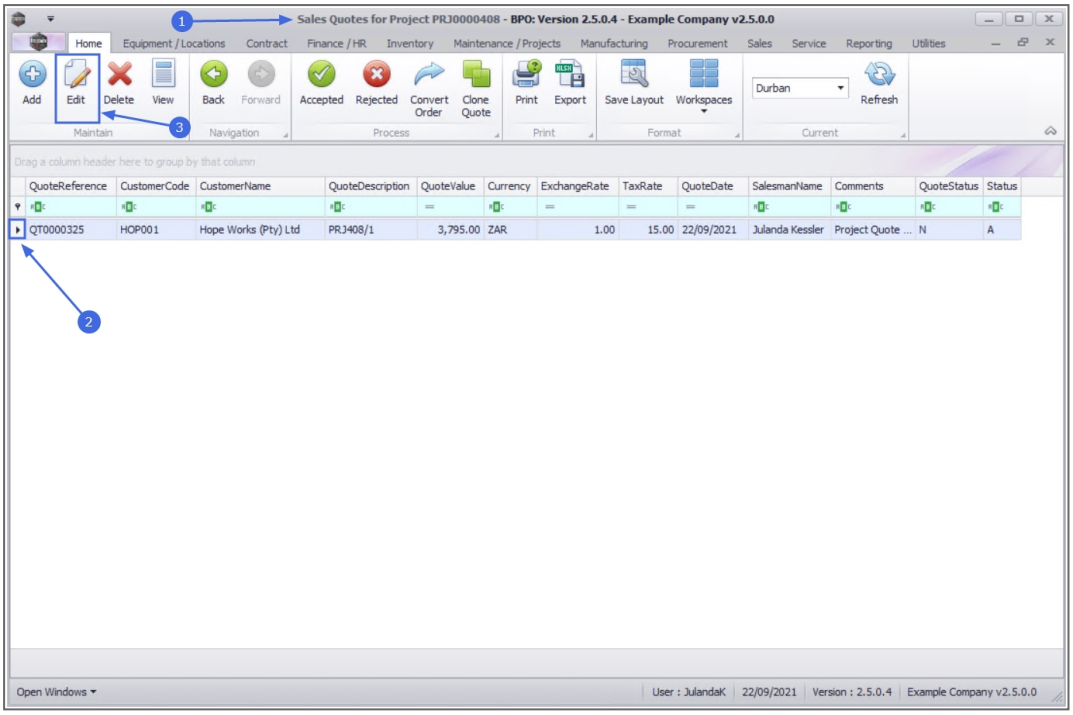

4. "The Edit Customer Quote - QT[quote number] screen will display." on page 2
    - You have the option to Quotes - Apply Sales Template as well as Quotes - Apply Project Methodology to the Quote.
    - Make changes to the ***Heading Information*** or to Items in the ***Sales Items grid***.
5. Click on ***Save*** to save the changes and to return to the ***Sales Quotes for Project*** listing screen.

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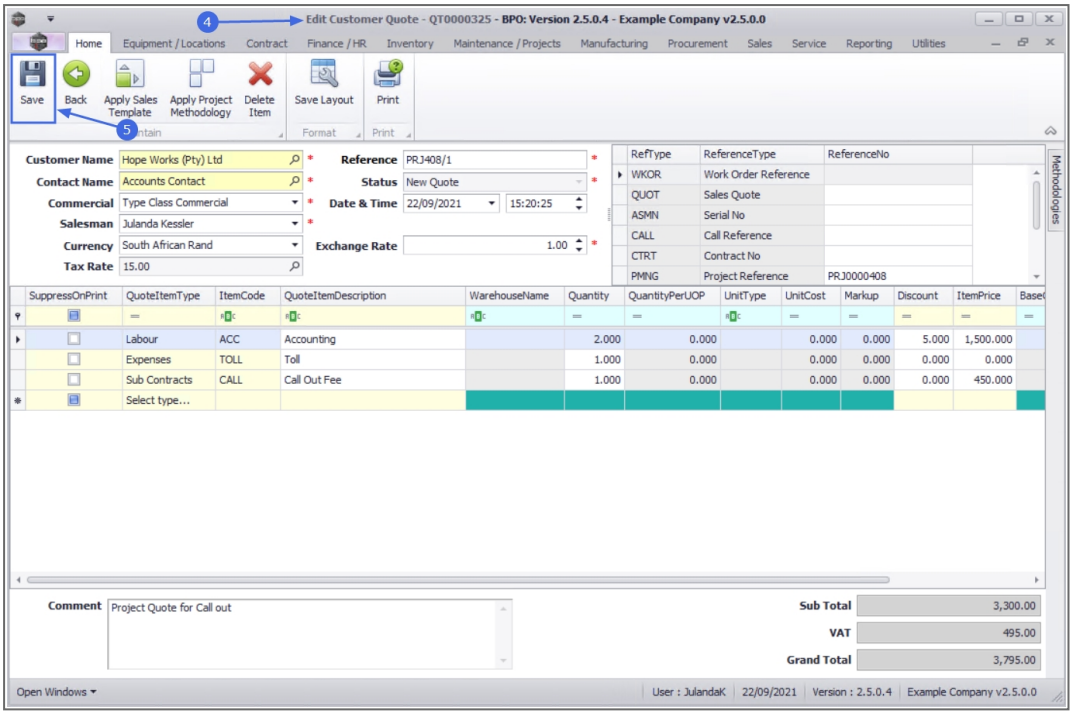

DELETE QUOTE

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

1. From the ***Sales Quotes for Project*** *[project ref number]* 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 ***All groups*** 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 of your selection.*

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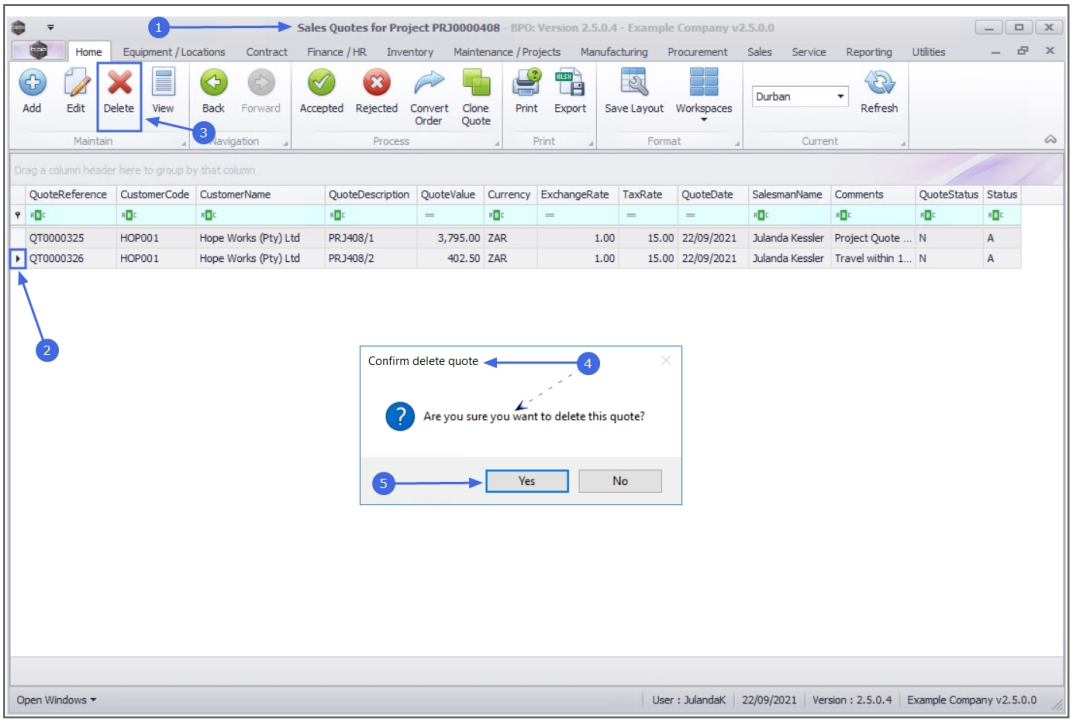

The Sales Quote will be ***removed*** from the ***Sales Quotes for Project*** listing screen.

VIEW QUOTE

A Quote in any *Quote Status* can be Viewed.

1. From the ***Sales Quotes for Project*** *[project ref number]* screen,
2. Click on the ***row*** of the Sales Quote you wish to ***view***.
3. Click on ***View***

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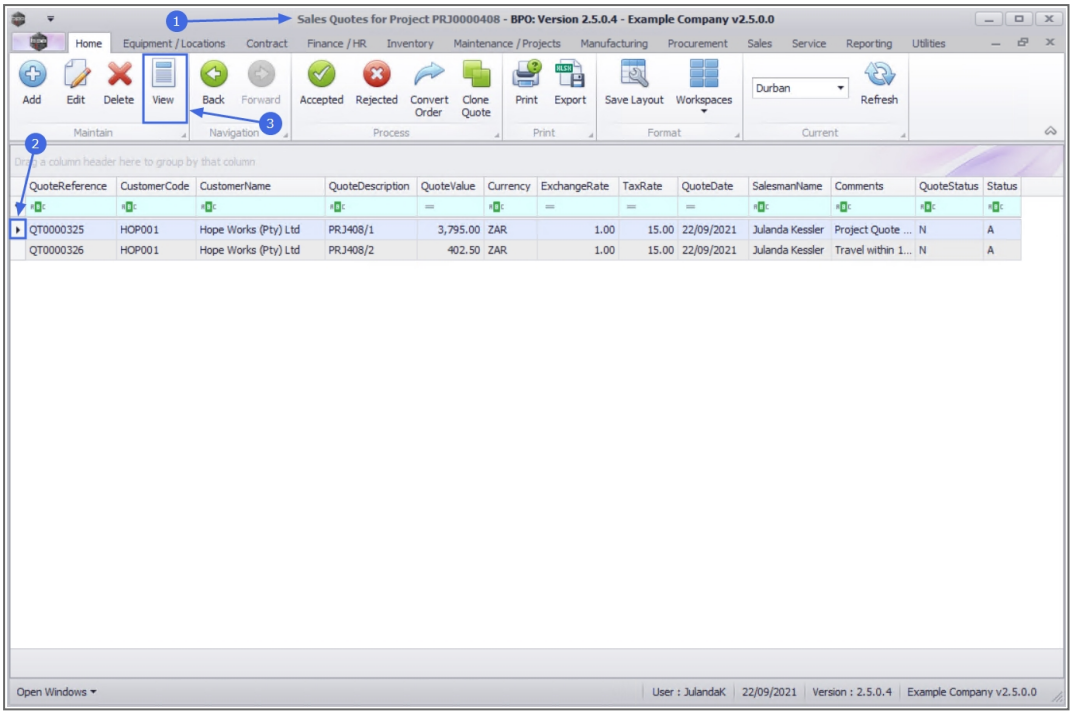

4. The ***View Customer Quote - [****quote number****]*** screen will display.

> No changes can be made to the information on the Quote.

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

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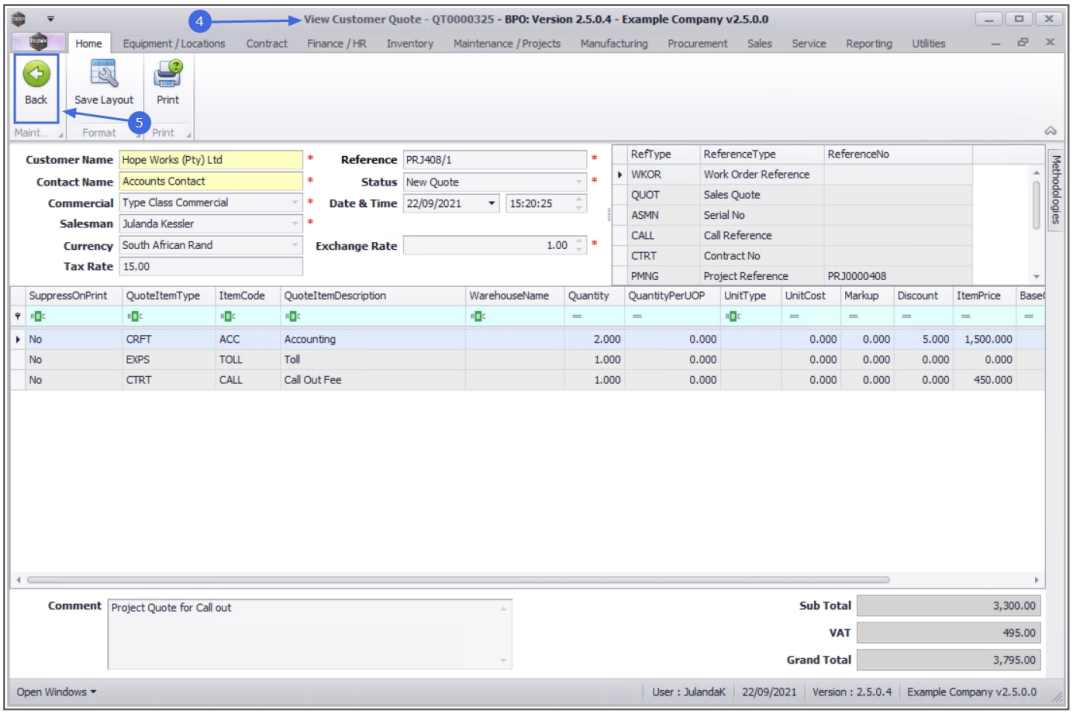

FORWARD NAVIGATION

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 for the selected Sales Quote.

1. From the Sales Quotes list screen, change the ***Status*** to *Invoiced Quote* to display a list of all invoiced quotes.
2. Click on the ***row*** of the Invoiced Quote 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 down-stream process documents related to the selected order is available and you can

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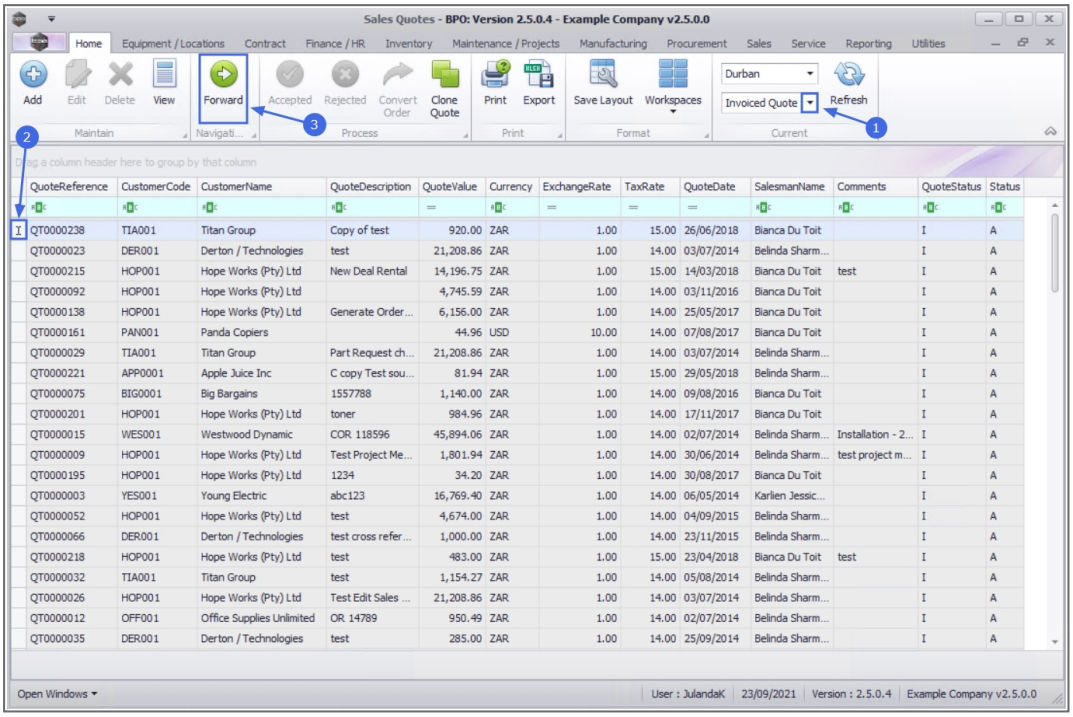
thus navigate to those downstream documents, e.g. the linked *Sales Invoice*, the new deal **Call** or **Project**.



BACK NAVIGATION

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

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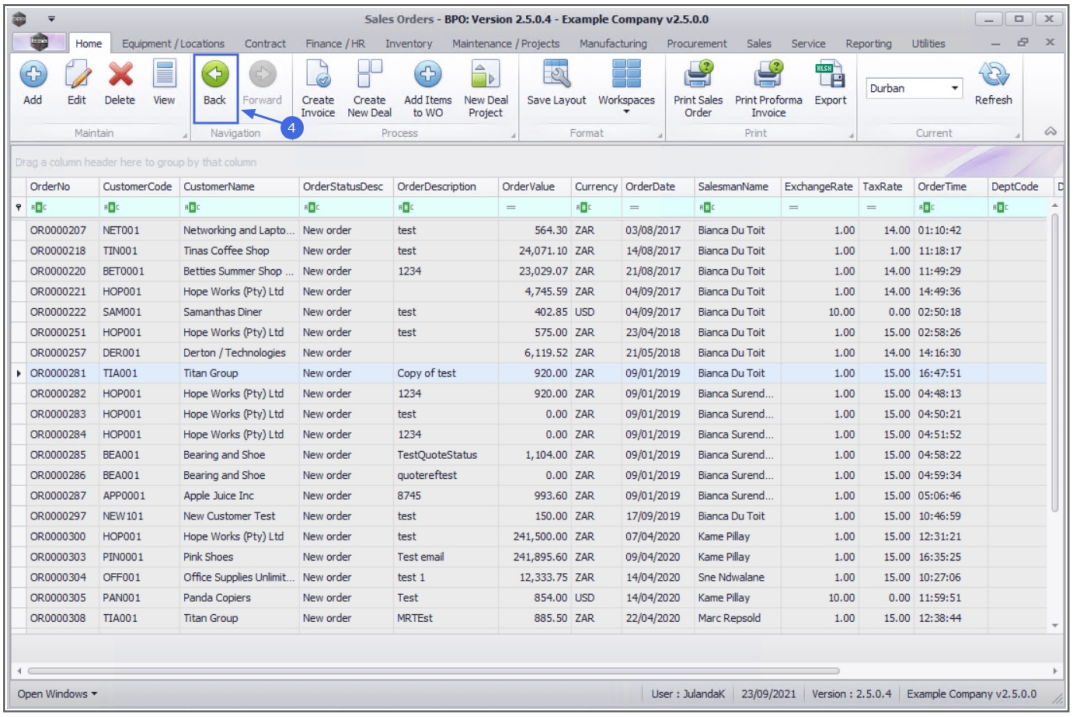

ACCEPT QUOTE

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

1. From the ***Sales Quotes for Project*** *[project ref number]* 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***.

3. When you receive the ***Input Validation*** message to confirm;
    - ***Are you sure you want to update this quote, no.*** *[quote number]* ***to be Accepted? Answer 'Yes' to mark it as Accepted.***
4. Click on ***Yes***.

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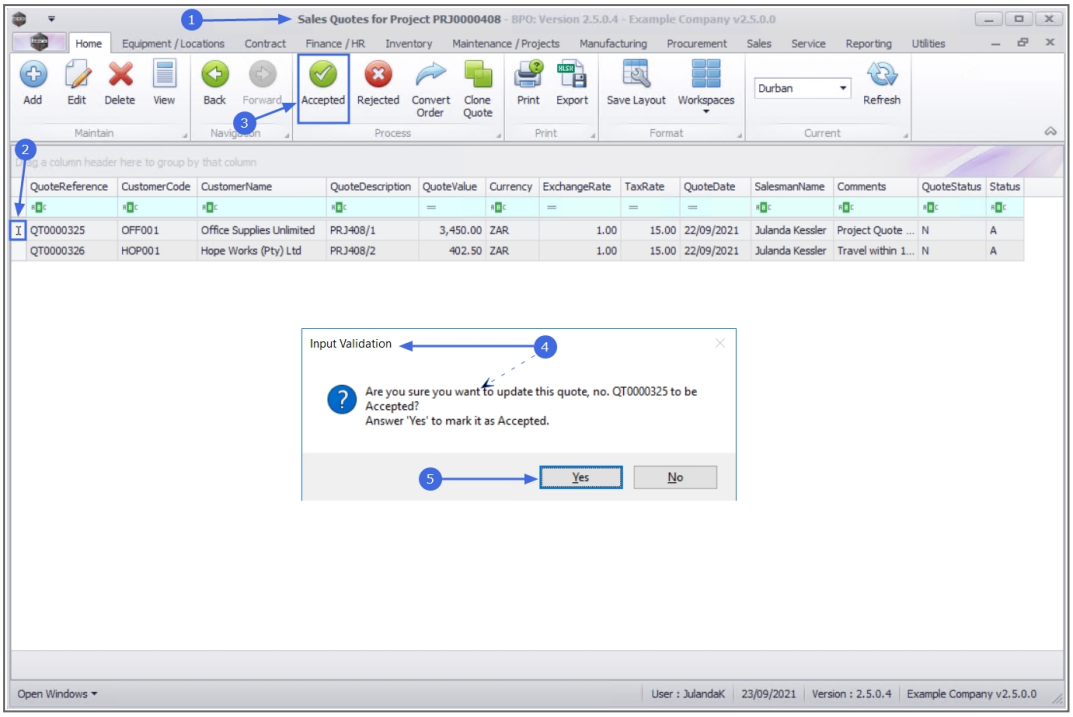

The Quote Status for the selected Quote has changed to ***[A] - Accepted*** on the ***Sales Quotes for Customer*** listing Screen.

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 Projects*** *[project number]* screen,
2. Click on the ***row*** of the Sales Quote that needs to be ***rejected***.
3. Click on ***Rejected***.

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

3. When you receive the ***Input Validation*** screen to confirm;
    - ***Are you sure you want to update this quote, no. QT****[quote number]* ***to be Rejected? Answer 'Yes' to mark it as Rejected.***

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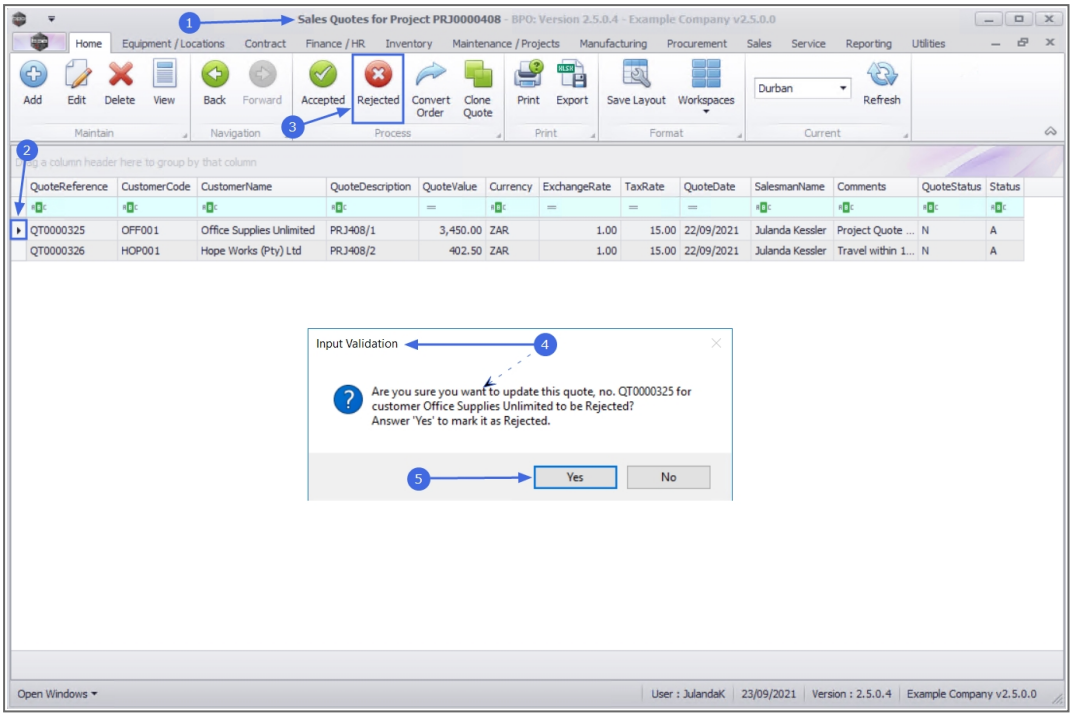
4. Click on ***Yes***.



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 Project*** *[project ref number]* screen,
2. 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***.

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

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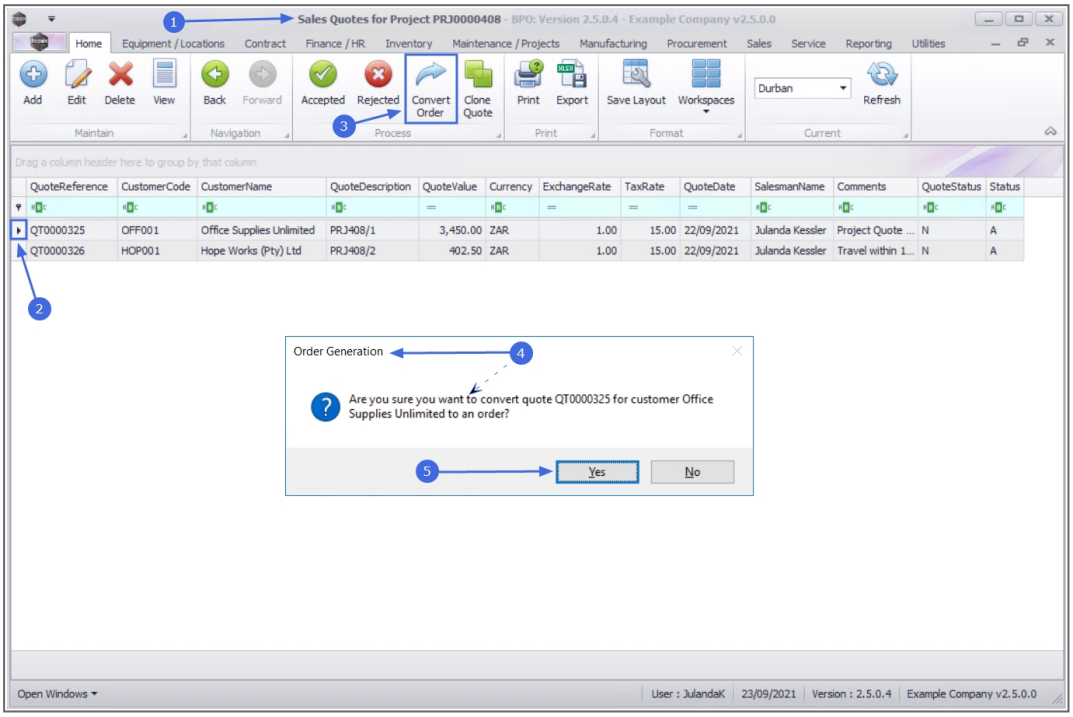
4. When you receive the first ***Order Generation***message to confirm;
    - ***Are you sure you want to convert quote QT[****quote number****], for Customer [****customer name****] to an order?***
5. Click on ***Yes***.



6. The second ***Order Generation*** message will confirmation;
    - ***Do you wish to close the quote [****quote number****] off? No further orders will be possible from this quote if it is closed.***
7. Click on ***Yes***.

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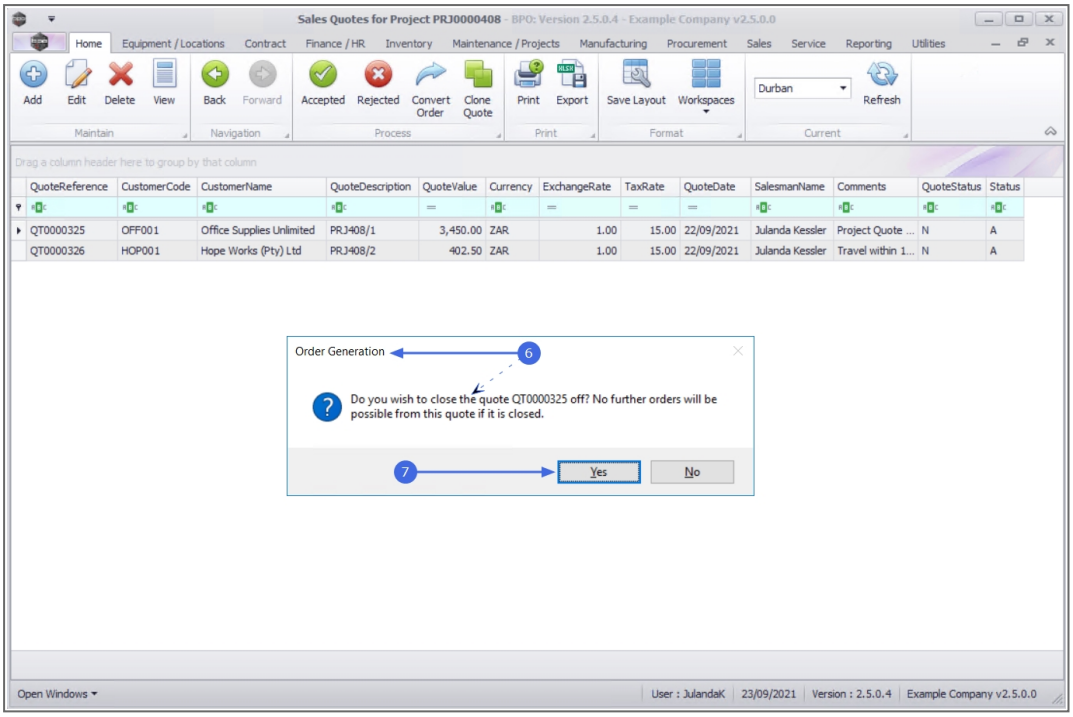

8. The third ***Order Generation*** message will confirm;
    - ***Do you wish to view the order created, no. OR[****order number****]?***
9. Click ***Yes*** to view the order.
    - Selecting ***No*** will leave you on the ***Sales Quotes for Customer*** screen.

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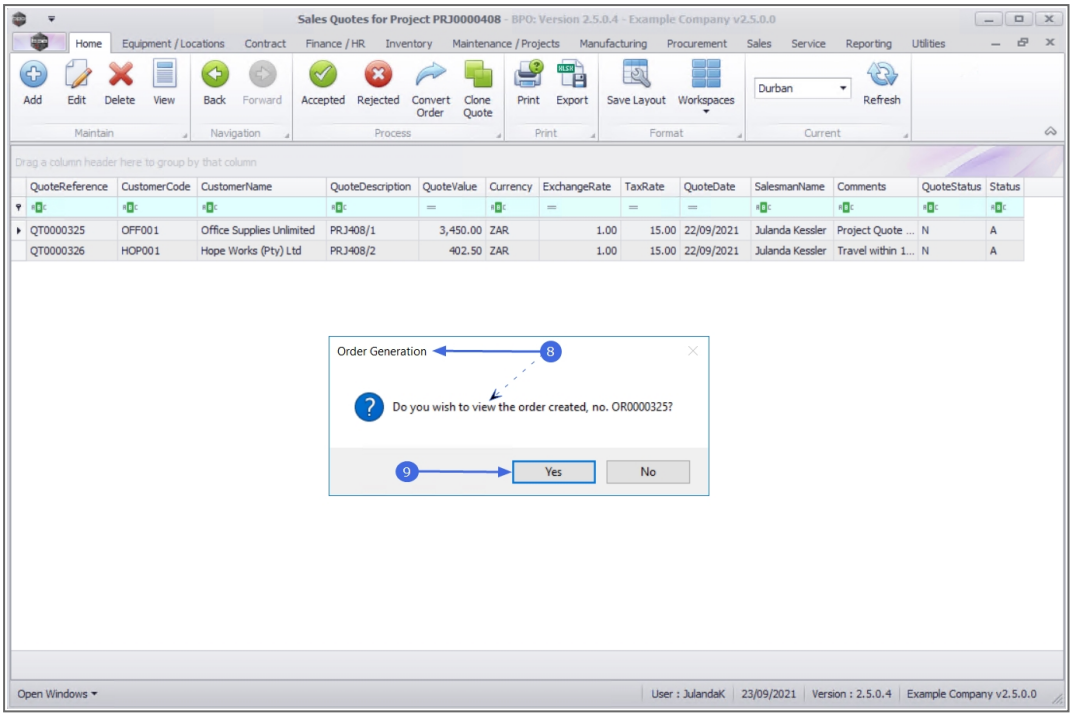

The ***Sales Orders*** listing screen will display the a list of all ***New Orders*** for the ***Site*** you have selected.

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 Project*** *[project ref number]* 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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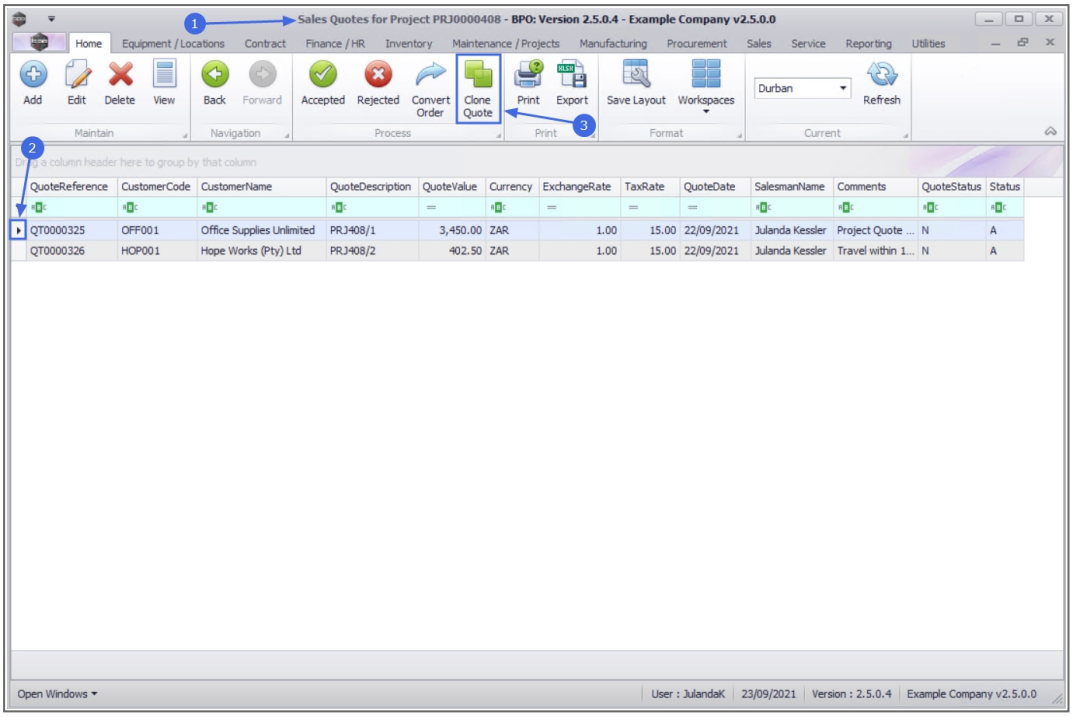

4. The ***Add new Customer Quote*** screen will display.

It is important that a new *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 the ***Line Item details***, if required.
7. You can also choose to apply a Quotes - Apply Sales Template, which will be appended to the existing quote items, as well as Quotes - Apply Project Methodology to the cloned quote, if required.

For a detailed handling of this topic refer to Quotes - Clone a Quote

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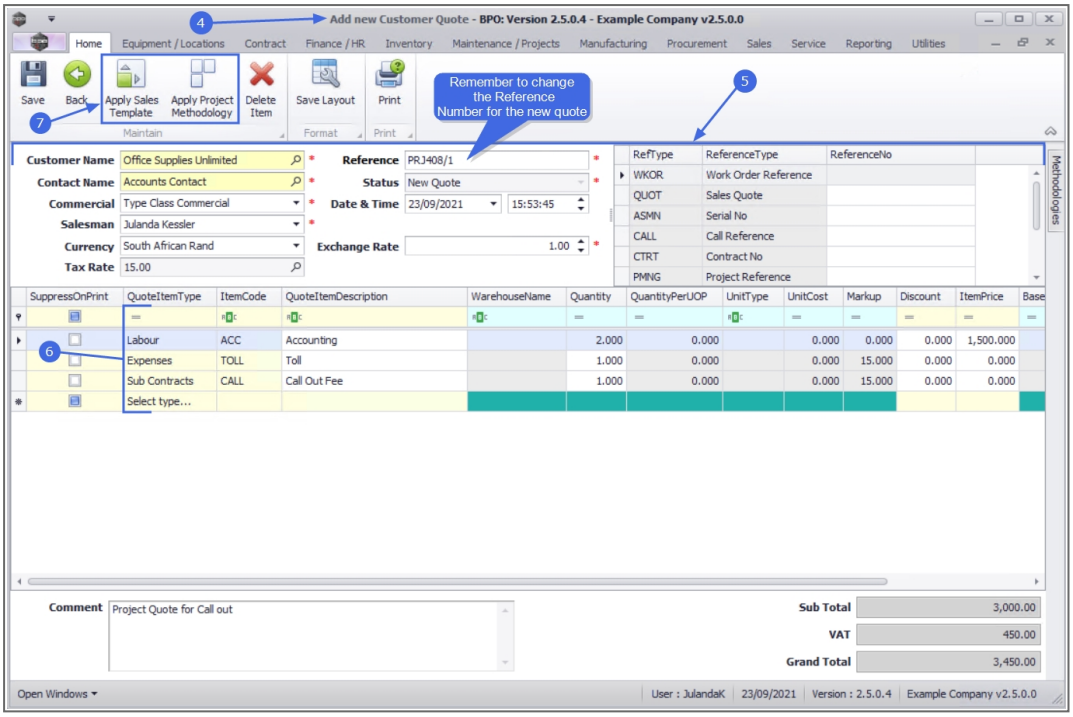

PRINT QUOTE

1. From the ***Sales Quotes for Project*** *[project ref number]* listing screen,
2. Click on the ***row*** of the Quote you wish to print.
3. Click on ***Print***.

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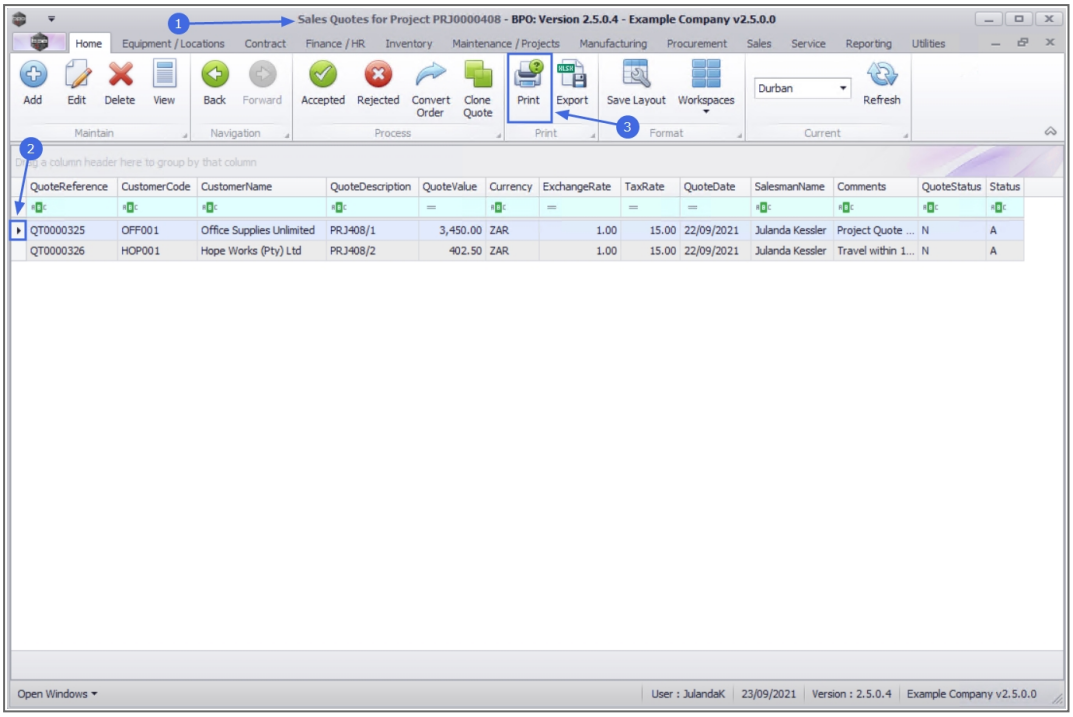

4. The ***Select the option as desired*** message screen will display with the following options;
    - ***Print Quote*** will open the Sales Quote in the Preview screen to view, print, export or email.
    - ***Email Quote*** will allow you to add recipients and the system will create a .pdf of the Sales Quote as an Attachment to the email.
    - ***Print and Email Quote*** will display both the Report Preview and Email screens.
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.

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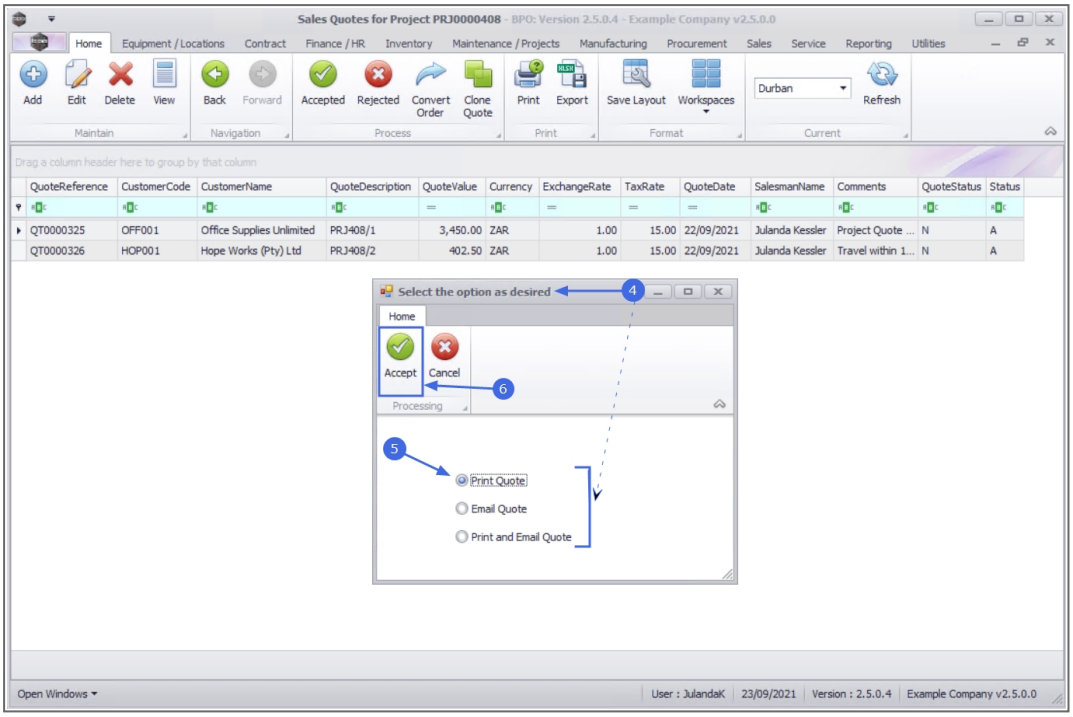
6. Click on ***Accept***.



7. The Sales Quote will display in the ***Preview*** screen.
8. From this screen 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 Project*** screen.

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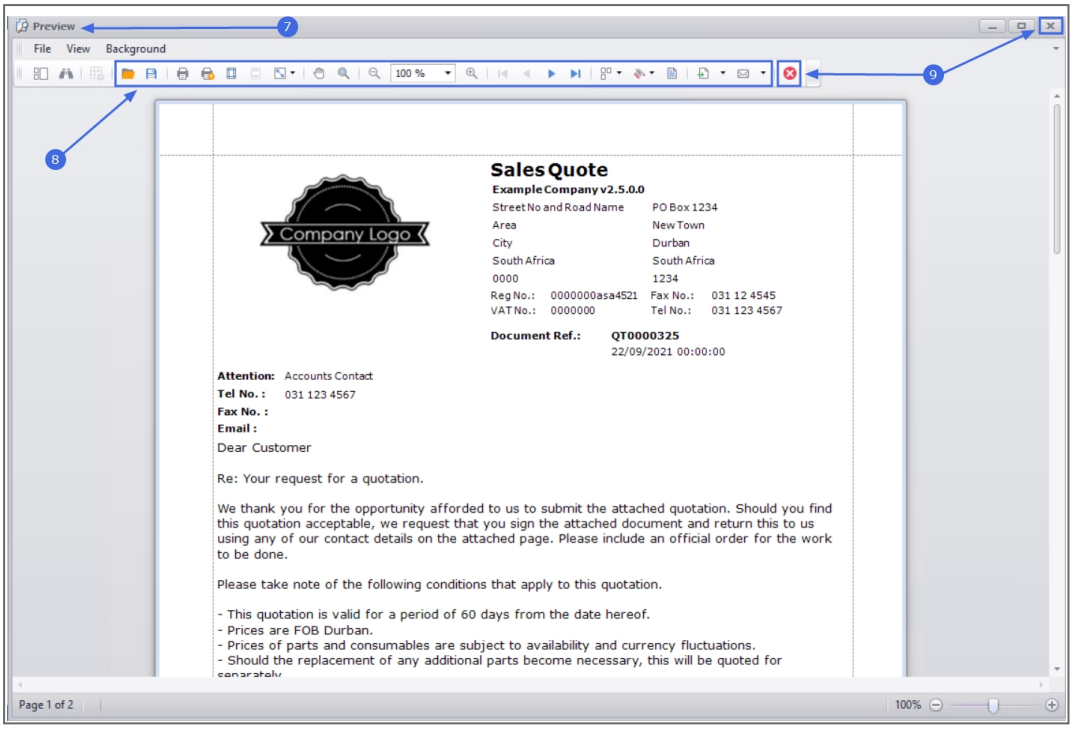

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