

# **PROJECTS**

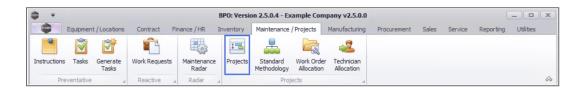
# **PROJECTS - QUOTES**

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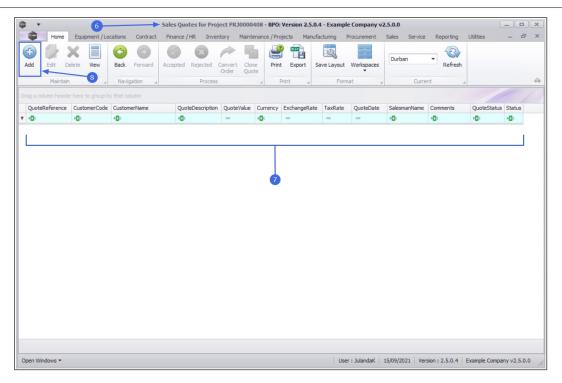
- 6. The *Sales Quotes for Project [project ref number]* listing screen will be displayed.
- 7. Any quotes that have already been created for the project will be listed on this screen.

# **ADD QUOTE**

8. Click on Add.

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





- 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*.
- 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**

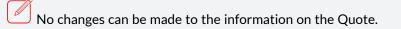
A Quote in any Quote Status can be Viewed.

- 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.



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 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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QT0000029	TIA001	Titan Group	Part Request ch	21,208.86		1.00		03/07/2014	Belinda Sharm		I	Α	
QT0000221	APP0001	Apple Juice Inc	C copy Test sou	81.94	ZAR	1.00	15.00	29/05/2018	Belinda Sharm		I	Α	
QT0000075	BIG0001	Big Bargains	1557788	1,140.00	ZAR	1.00	14.00	09/08/2016	Bianca Du Toit		I	Α	
QT0000201	HOP001	Hope Works (Pty) Ltd	toner	984.96	ZAR	1.00	14.00	17/11/2017	Bianca Du Toit		I	Α	
QT0000015	WES001	Westwood Dynamic	COR 118596	45,894.06	ZAR	1.00	14.00	02/07/2014	Belinda Sharm	Installation - 2	I	Α	
QT000009	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		Ι	Α	
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		Ι	Α	
QT0000026	HOP001	Hope Works (Pty) Ltd	Test Edit Sales	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		Ι	Α	
QT0000012	OFF001	Office Supplies Unlimited	OR 14789	950.49	ZAR	1.00	14.00	02/07/2014	Belinda Sharm		Ι	Α	
QT000035	DER001	Derton / Technologies	test	285.00	ZAR	1.00	14.00	25/09/2014	Belinda Sharm		I	Α	

### **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.



*		e Equipment /	Locations Contract	Finance / HR I	s Orders - BPO: Ver	ance / Projects	Manufac		curement Sales	Service Re	porting	Utilities		x
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	OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCod	le
9	RBC	8 <mark>0</mark> 0	8 B C	8 C	R C	=	8 B C	=	RBC	=	=	A C	RBC	
	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		04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60		09/01/2019	Bianca Surend	1.00		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 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.



ф т	1	Sale:	s Quotes for Proje	ect PRJ00004	108 - BPO:	Version 2.5.0.4	- Example	Company	/2.5.0.0			_ 0	x
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I QT0000325	OFF001	Office Supplies Unlimited	PRJ408/1	3,450.00	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Project Quote	N	A	
QT0000326	HOP001	Hope Works (Pty) Ltd	PRJ408/2	402.50	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Travel within 1	N	A	
		115	Accepted			4 this quote, no. C ed. <u>Y</u> es	2T0000325 to						
Open Windows -							User :	: JulandaK	23/09/2021 Ver	sion : 2.5.0.4 E	xample Compar	iy v2.5.0	0.0

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.



#### 4. Click on Yes.

<b>v</b>		Sales	s Quotes for Proje	ect PRJ00004	108 - BPO:	Version 2.5.0.4	- Example	Company v2	1.5.0.0				X
Home	Equipment / Loc	ations Contract Fina	ance / HR Invent	tory Mainter	nance / Pro	jects Manufa	cturing Pro	ocurement	Sales Service	Reporting	Utilities	_ 8	x
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QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	
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QT0000325	OFF001	Office Supplies Unlimited	PRJ408/1	3,450.00	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Project Quote	. N	A	
QT0000326	HOP001	Hope Works (Pty) Ltd	PRJ408/2	402.50	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Travel within 1	. N	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 Project [project ref number] 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*.

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



- 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.

Yone       Equpment/Locations       Contract       Finance /HR       Inventory       Maintenance /Projects       Manufacturing       Procurement       Sales       Service       Reporting       Utilies       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -	-	•	Sa Sa	ales Quotes for Proj	ect PRJ00004	108 - BPO:	Version 2.5.0.4	- Example	Company v	2.5.0.0			
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QT00000326       HOP001       Hope Works (Pty) Ltd       PRJ408/2       402.50       ZAR       1.00       15.00       22/09/2021       Julanda Kessler       Travel within 1 N       A         Image: Constraint of the state o	-									-	-		-
Order Generation       4         Xre you sure you want to convert quote QT0000325 for customer Office         Supplies Unlimited to an order?													
Are you sure you want to convert quote QT0000325 for customer Office Supplies Unlimited to an order?													
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					5		Yes		No				
					5		► Yes		No				
					5		► <u>Y</u> es		No				
					5				No				

- 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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QT0000325         OFF001         Office Supplies Unlimited         PRJ408/1         3,450.00         ZAR         1.00         15.00         22/09/2021         Julanda Kessler         Project Quote N         A           QT0000326         HOP001         Hope Works (Pty) Ltd         PRJ408/2         402.50         ZAR         1.00         15.00         22/09/2021         Julanda Kessler         Project Quote N         A           Order Generation        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0        0	QT0000325         OFF001         Office Supplies Unlimited Hop001         PRJ408/1         3,450.00         ZAR         1.00         15.00         22/09/2021         Julanda Kessler         Project Quote N         A           QT0000326         HOP001         Hope Works (Pty) Ltd         PRJ408/2         402.50         ZAR         1.00         15.00         22/09/2021         Julanda Kessler         Project Quote N         A           Order Generation												-		
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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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			9			Yes	No						
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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*.



	Ŧ	<b>[</b>		Sales Quotes for Proj	ect PRJ00004	408 - BPO:	Version 2.5.0.4	- Example	Company v2	2.5.0.0				
1	Home	Equipment / Loc	ations Contract	Finance / HR Inven	tory Mainte	mance / Pro	jects Manufac	turing Pr	ocurement	Sales Service	Reporting I	Utilities	_ 6	1 )
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Q	T0000325	OFF001	Office Supplies Unlim	nited PRJ408/1	3,450.00	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Project Quote	N	A	
Q	T0000326	HOP001	Hope Works (Pty) Lt	d PRJ408/2	402.50	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Travel within 1	N	Α	

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 the *Line Item details*, if required.
- 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



SuppressOnPrint QuoteItemType ItemCode QuoteItemDescription WarehouseName Quantity QuantityPerUOP UnitCost Markup Discount ItemPrice B	٦	Ŧ	4			Add new C	ustomer	Quote - BPO	Version 2.	5.0.4 - Exa	nple (	Company v2	.5.0.0					
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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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- 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.

• Fint and Email Quote will display both the Report Pre-

view 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.



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

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- 7. The Sales Quote will display in the *Preview* screen.
- 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.





#### MNU.058.011