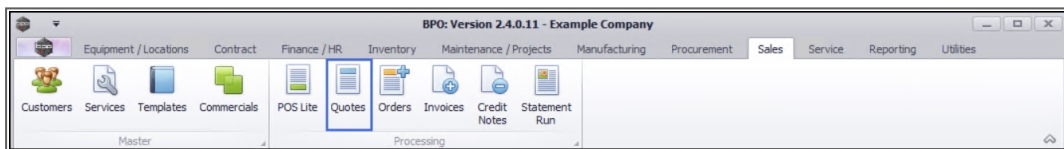


## SALES

### QUOTES – CLONE A QUOTE

From the Sales Quotes listing screen you have access to the Clone Quote feature, which enables you to make a copy of a selected quote. The quote header details and the line items that have been cloned from the original quote can be edited or removed and new items can be added, as required and therefore saves the user valuable time.

**Ribbon Access:** *Sales > Quotes*



1. From the **Sales Quotes** listing screen;
2. Select the **Site** that contains the quote to be copied
  - The example has **Durban** selected.
3. Select the **Status** that contains the quote to be copied (a quote can be cloned in any status),
  - The example has **New Quote** selected.
4. Click on the **row** of the quote you wish to clone.
5. Click **Clone Quote**.

The nature of cloning a quote is to *save time* when creating new quotes for customers. On this basis, most of the details of the quote would remain the same, bar the Reference. However, you may wish to *edit* some of the details, for example, the *customer information*, the *discount amount* or *add* items, such as a warranty, to the quote.

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

2. Ensure that a new **Reference** is typed for this quote. This is for internal use and is very important as it is used to find and identify the quote once it has been processed.

## CUSTOMER AND FINANCIAL HEADER INFORMATION

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3. Change the Customer Heading or the Financial Heading information as required. If you need more information on how to edit the Quote Heading Information click on the link to be redirected to [Quotes Edit Sales Quote](#).

## LINK A CROSS REFERENCE

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4. Follow the process to [link Cross Reference](#) details for the quote.



Note that the cross reference information of the original quote will not clone.

## ADD / EDIT / DELETE LINE ITEMS

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5. Individual Item Lines can be [added](#), [edited or deleted](#) from the Items data grid as required.

## APPLY SALES TEMPLATE / PROJECT METHODOLOGY

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6. You can apply a Sales Template which will be appended to the existing quote items, and / or [Quotes - Apply Project Methodology](#) to the cloned quote, if required.

## ADD / EDIT A COMMENT

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7. Add or make changes to the **Comment** for the new quote, if required. The comments field will pull through to the Sales Quote document when it is printed.

1 → Add new Customer Quote - BPO: Version 2.4.0.0 - Example Company

6 Save 3 Back 4 Apply Sales Template 5 Apply Project Methodology 2 Delete Item 3 Save Layout 4 Print

Customer Name: Hope Works (Pty) Ltd  
 Contact Name: Tom Watts  
 Commercial: Default  
 Salesman: Bianca Du Toit  
 Currency: South African Rand  
 Tax Rate: 15.00

Reference: AB02  
 Status: New Quote  
 Date & Time: 27/05/2020 19:19:31  
 Exchange Rate: 1.00

ReType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	
QUOT	Sales Quote	
ASMN	Serial No	
CALL	Call Reference	
CTRT	Contract No	
PMNG	Project Reference	

SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
<input type="checkbox"/>	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000	0.000		415.917	0.000	0.000	415.920	415.920	15.000	A
<input type="checkbox"/>	Parts	SP2020	SP2020 Sprint Colour Multi ...	Main Warehouse	1.000	0.000		2,816.667	0.000	0.000	12,345.000	12,345.000	15.000	A
<input type="checkbox"/>	Labour	TECH	Technician		1.000	0.000		0.000	0.000	0.000	260.470	260.470	15.000	A
<input type="checkbox"/>	Travel	100	Travel not exceeding 100 km		1.000	0.000		0.000	0.000	0.000	350.000	350.000	15.000	A
<input type="checkbox"/>	Select type...													

5

Comment

7

Sub Total: 13,371.39  
 VAT: 2,005.71  
 Grand Total: 15,377.10

Open Windows User: AbigailM 27-05-2020 Version: 2.4.0.0 Example Company

## SAVE QUOTE

- When you have finished editing the Customer Quote, click on **Save**.

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting U...

Save Back Apply Sales Template Apply Project Methodology Delete Item Save Layout Print

8

Customer Name Bits and Bytes Reference CloneQuote-AB02 Status New Quote RefType ReferenceType ReferenceNo  
 Contact Name Josh Meyers WKOR Work Order Reference  
 Commercial Type Class Commercial QUOT Sales Quote  
 Salesman Abigail Milne ASMN Serial No  
 Currency South African Rand CALL Call Reference  
 Tax Rate 15.00 CTRT Contract No  
 Exchange Rate 1.00 PMNG Project Reference

SuppressOnPrint	QuoteItem	Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice
	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000	0.000	415.917	0.000	0.000	415.920		
	Parts	SP2020	SP2020 Sprint Colour Multi Function...	Main Warehouse	1.000	0.000	2,816.667	0.000	0.000	12,345.000		
	Labour	TECH	Technician		1.000	0.000	0.000	0.000	0.000	260.470		
	Travel	100	Travel not exceeding 100 km		1.000	0.000	0.000	0.000	0.000	350.000		
	Warranty	F1YW	Full 1 Year Warranty - unit and part...		1.000	0.000	0.000	0.000	0.000	2,000.000		
	Select type...											

Comment AB02 quote cloned for different customer

Sub Total 15,371.39  
 VAT 2,305.71  
 Grand Total 17,677.10

Open Windows Capture screenshot User : JulandaK 24/02/2021 Version : 2.4.0.11 Example Company

The **Sales Quotes** listing screen will be updated with the New Quote.

## VIEW QUOTE IN CRM

The new cloned quote will pull through to **CRM** where you can [Quotes - View Quote in CRM](#).

MNU.062.004

