

SALES

QUOTES – APPLY SALES TEMPLATE

Sales Templates can be set up for **bundles** or **sets** that are usually sold together.

For example:

- A machine model plus
 - its standard accessories,
 - toners
 - and service charges.

This template can then be used when creating a new **Sales Quote**. The quote can be amended, where required, for instance the **item quantities** can be updated.

Unit costs are updated on the **Sales Quote** when applied, and the selling price is calculated based on the unit cost of the item. The selling price can also be amended on the Quote.

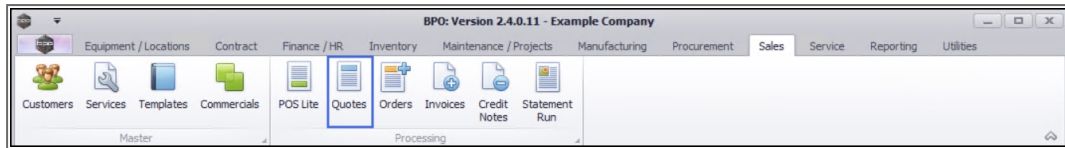
One or multiple Sales Templates can be applied to a Quote.

Multiple Sales Templates and Project Methodologies can be applied to the same Sales Quote.

A Sales Template can be applied when a Quote is created, or when Editing a Quote.

For the purpose of this manual, a Sales Template will be applied while creating a New Quote.

Ribbon Access: Sales > Quotes



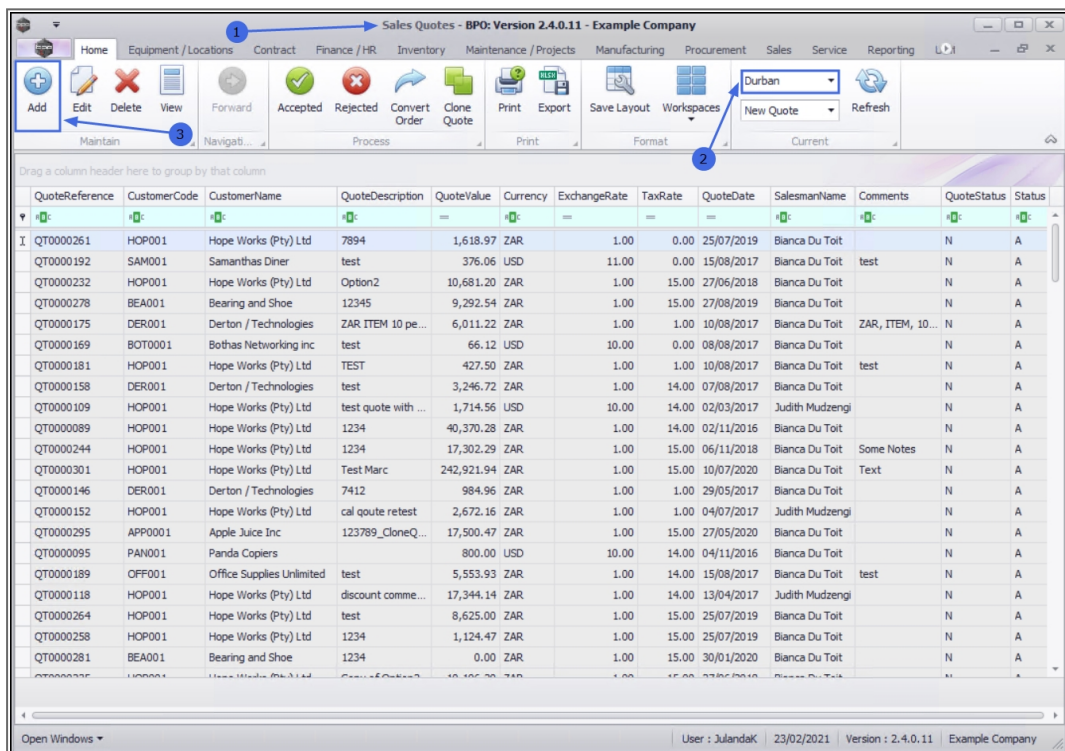
1. The **Sales Quotes** listing screen will display.
2. Select the **Site** you wish to work in.
 - The example has **Durban** selected.

ADD QUOTE

3. Click on **Add**.



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



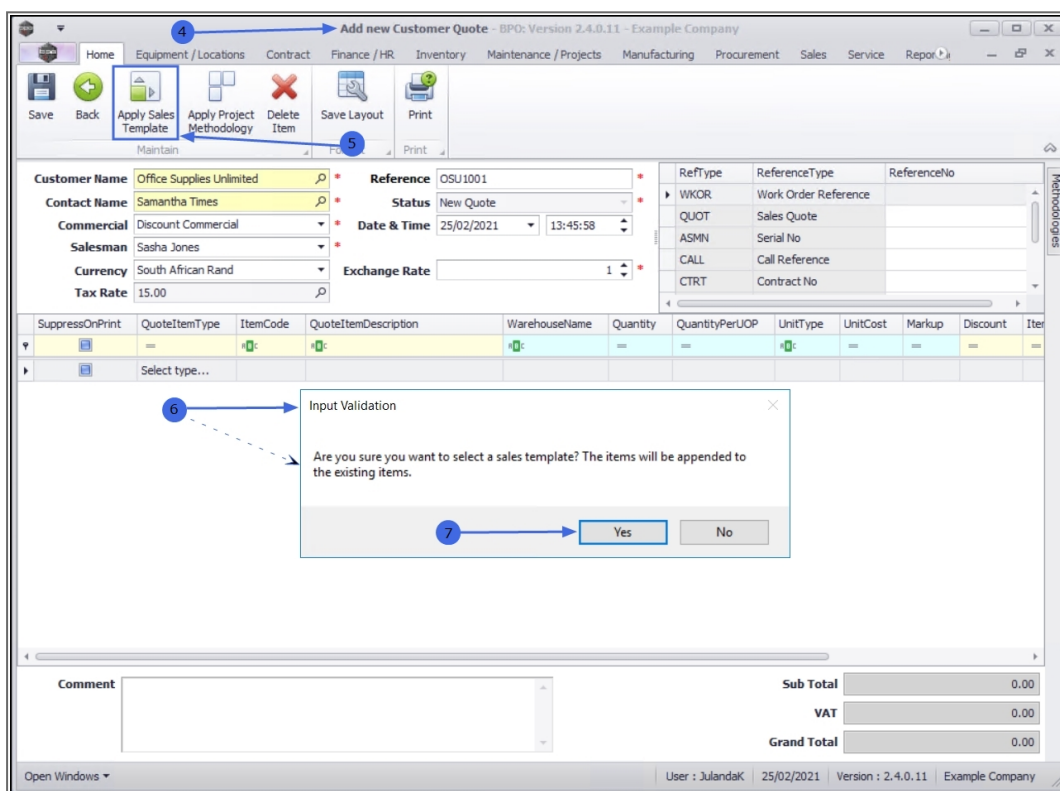
QUOTE HEADER

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

Complete the **Customer Heading**, the **Financial Heading** and **Cross Reference Information**. For a detailed handling of this topic refer to [Quotes - Add Sales Quote](#).

APPLY SALES TEMPLATE

5. Click **Apply Sales Template**.
6. When you receive the **Input Validation** message confirming;
 - **Are you sure you want to select a sales template? The items will be appended to the existing items.**
7. Click on **Yes**.



The screenshot shows the 'Add new Customer Quote' window. The 'Apply Sales Template' button is highlighted with a blue circle and an arrow pointing to it. Below the button, an 'Input Validation' dialog box is displayed with the message: 'Are you sure you want to select a sales template? The items will be appended to the existing items.' The 'Yes' button in the dialog is also highlighted with a blue circle and an arrow pointing to it.

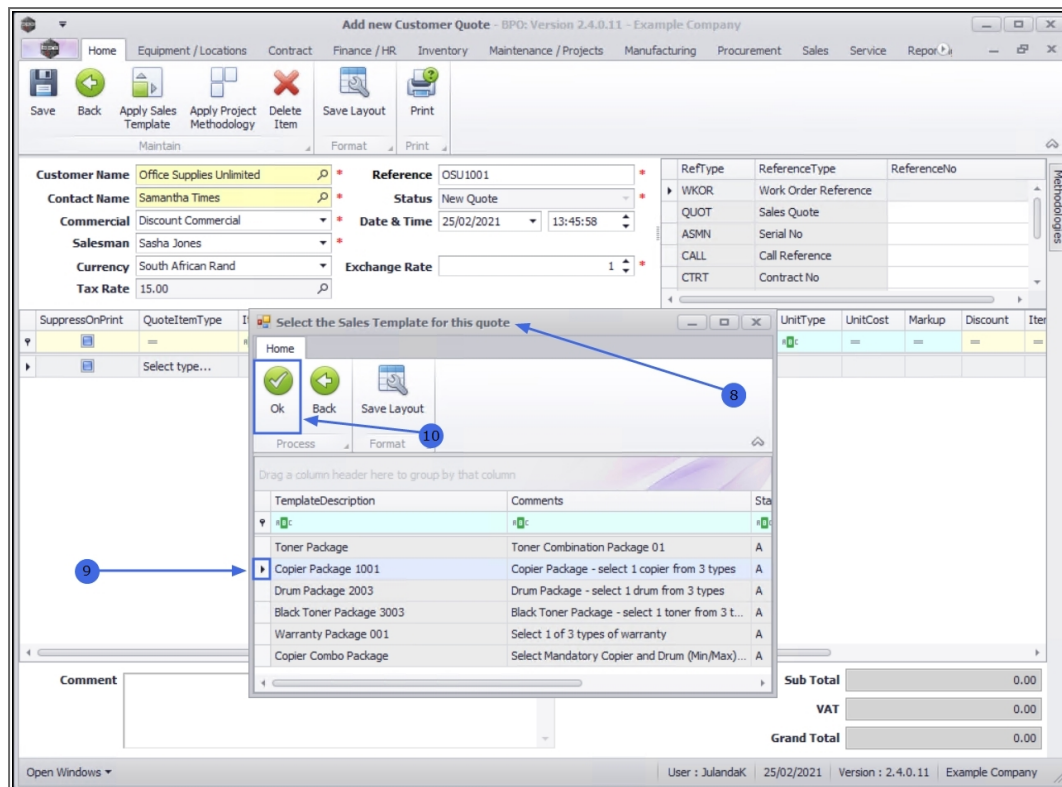
Customer Name	Contact Name	Commercial	Salesman	Currency	Tax Rate	Reference	Status	Date & Time	Exchange Rate
Office Supplies Unlimited	Samantha Times	Discount Commercial	Sasha Jones	South African Rand	15.00	OSU1001	New Quote	25/02/2021 13:45:58	1

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

SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	Item
			Select type...								

Sub Total: 0.00
VAT: 0.00
Grand Total: 0.00

8. The **Select the Sales Template for this quote** screen will display.
9. Click on the **row** of the **Sales Template** you wish to apply.
10. Click on **OK**.



TemplateDescription	Comments	Status
Toner Package	Toner Combination Package 01	A
Copier Package 1001	Copier Package - select 1 copier from 3 types	A
Drum Package 2003	Drum Package - select 1 drum from 3 types	A
Black Toner Package 3003	Black Toner Package - select 1 toner from 3 t...	A
Warranty Package 001	Select 1 of 3 types of warranty	A
Copier Combo Package	Select Mandatory Copier and Drum (Min/Max)...	A

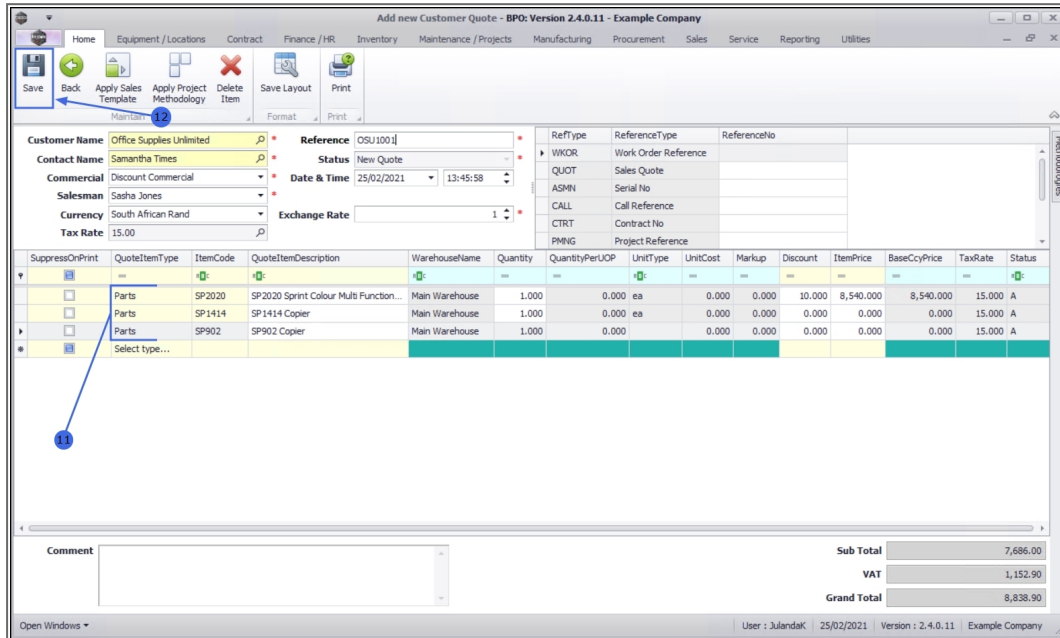
QUOTE ITEMS DATA GRID

11. The **Items** data grid is populated with the items already set up from the Sales Template selected.

- Ensure that all the **selling prices** have been completed.
- You can add more than one Sales Template to the quote.
- Individual Quote items can be added or deleted. Click on the link if you need assistance on how to [Quotes - Add Sales Quote](#) or on how to [Quotes Edit Sales Quote](#).
- Use the "View Stock" on page 10 feature to ensure that the items you wish to include on the Quote, are available.

SAVE SALES QUOTE

12. When you have completed all the relevant information for the quote, click on **Save**.



Customer Name: Office Supplies Unlimited
Contact Name: Samantha Times
Commercial: Discount Commercial
Salesman: Sasha Jones
Currency: South African Rand
Tax Rate: 15.00
Reference: OSU1001
Status: New Quote
Date & Time: 25/02/2021 13:45:58
Exchange Rate: 1

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

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
	Parts	SP2020	SP2020 Sprint Colour Multi Function...	Main Warehouse	1.000	0.000	ea	0.000	0.000	10.000	8,540.000	8,540.000	15.000	A
	Parts	SP1414	SP1414 Copier	Main Warehouse	1.000	0.000	ea	0.000	0.000	0.000	0.000	0.000	15.000	A
	Parts	SP902	SP902 Copier	Main Warehouse	1.000	0.000	ea	0.000	0.000	0.000	0.000	0.000	15.000	A

Comment:

Sub Total	7,686.00
VAT	1,152.90
Grand Total	8,838.90

User : JulandaK 25/02/2021 Version : 2.4.0.11 Example Company

13. You will return to the **Sales Quotes** listing screen.
14. The New Quote can now be viewed in the **New Quote Status**.

Sales Quotes - BPD: Version 2.4.0.11 - Example Company

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

Add Edit Delete View Forward Accepted Rejected Convert Order Clone Quote Print Export Save Layout Workspaces New Quote Refresh

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000321	OFF001	Office Supplies Unlimited	OSU1001	8,838.90	ZAR	1.00	15.00	25/02/2021	Sasha Jones	Full installation...	N	A
QT0000178	PAN001	Panda Copiers	USD, 1, 10, ITEM	270.04	USD	10.00	1.00	10/08/2017	Bianca Du Toit		N	A
QT0000129	HOP001	Hope Works (Pty) Ltd	Call - Quote tes...	14,903.82	ZAR	1.00	1.00	25/05/2017	Judith Mudzengi		N	A
QT0000155	HOP001	Hope Works (Pty) Ltd	test	2,210.59	ZAR	1.00	1.00	28/07/2017	Bianca Du Toit		N	A
QT0000086	APP0001	Apple Juice Inc	iouyHj	8,347.60	ZAR	1.00	14.00	01/11/2016	Belinda Sharm...		N	A
QT0000135	HOP001	Hope Works (Pty) Ltd	Call - Quote v2...	493.62	ZAR	1.00	1.00	25/05/2017	Judith Mudzengi		N	A
QT0000112	HOP001	Hope Works (Pty) Ltd	546899732	4,617.00	ZAR	1.00	14.00	17/03/2017	Judith Mudzengi		N	A
QT0000292	BIG0001	Big Bargains	AB01_SalesStudio	241,500.00	ZAR	1.00	15.00	27/05/2020	Abigail Milne		N	A
QT0000298	HOP001	Hope Works (Pty) Ltd	AB014	15,392.35	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned...	N	A
QT0000149	HOP001	Hope Works (Pty) Ltd	Retest 2	6,156.00	ZAR	1.00	1.00	19/06/2017	Judith Mudzengi		N	A
QT0000190	BOT0001	Bothas Networking Inc		533.63	USD	10.00	0.00	15/08/2017	Bianca Du Toit		N	A
QT0000236	APP0001	Apple Juice Inc	1234	1,035.00	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	A
QT0000113	HOP001	Hope Works (Pty) Ltd	qote13	6,156.00	ZAR	1.00	14.00	04/04/2017	Bianca Du Toit		N	A
QT0000184	OFF001	Office Supplies Unlimited	bpo2 credit not...	196.65	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit		N	A
QT0000267	HOP001	Hope Works (Pty) Ltd	test multi level p...	8,625.00	ZAR	1.00	15.00	26/07/2019	Bianca Du Toit		N	A
QT0000230	APP0001	Apple Juice Inc	Copy of New123	4,597.20	ZAR	1.00	15.00	21/09/2016	Bianca Du Toit	Test custom r...	N	A
QT0000067	DER001	Derton / Technologies	test	570.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm...		N	A
QT0000313	BIT001	Bits and Bytes	CloneQuote-AB02	17,677.10	ZAR	1.00	15.00	15/07/2020	Abigail Milne	AB02 quote d...	N	A
QT0000276	BOT0001	Bothas Networking Inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A
QT0000121	HOP001	Hope Works (Pty) Ltd	test	22,852.44	ZAR	1.00	14.00	20/04/2017	Bianca Du Toit		N	A
QT0000127	HOP001	Hope Works (Pty) Ltd	commercial test	834.20	ZAR	1.00	1.00	10/05/2017	Judith Mudzengi		N	A
QT0000319	ABCKYZ123	ABC Shoe Co	tttttttttttt	3,000.00	ZAR	1.00	0.00	19/10/2020	Abigail Milne		N	A

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