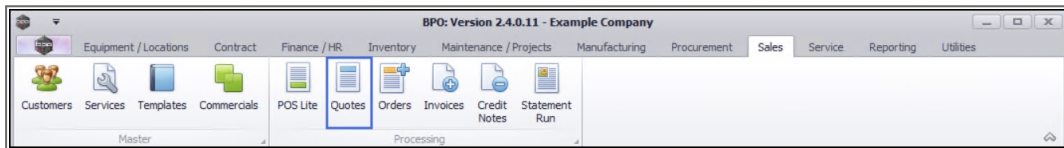


SALES

QUOTES – EDIT SALES QUOTE

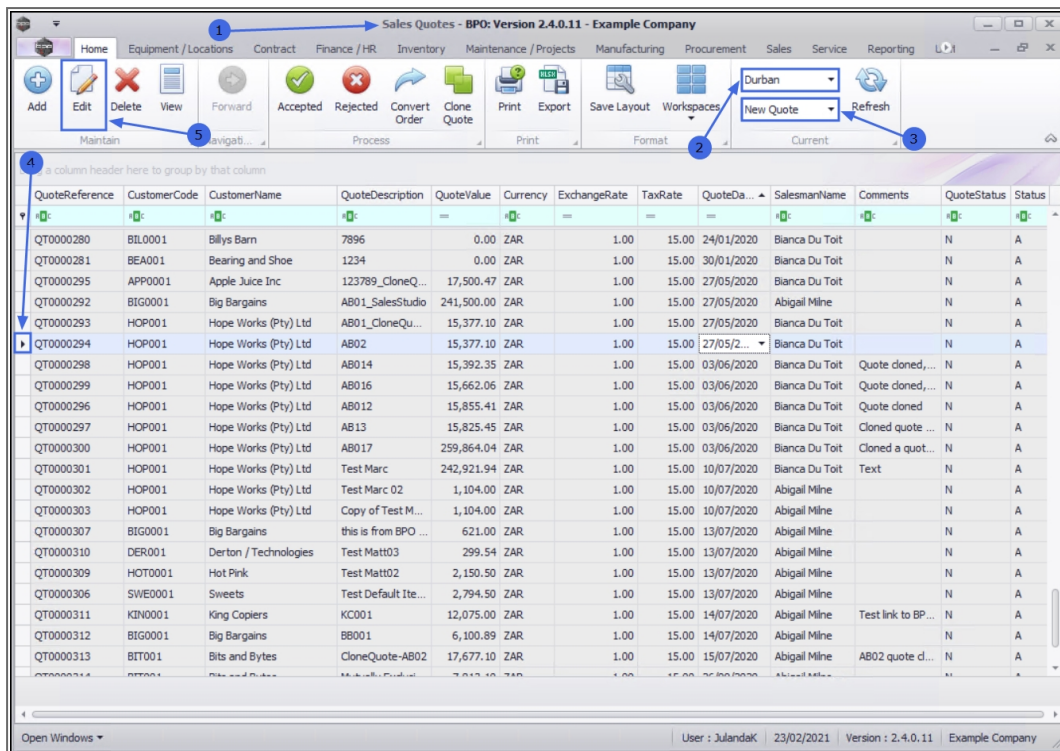
Ribbon Access: Sales > Quotes



1. The **Sales Quotes** listing screen will display.
2. Select the **Site** where the quote can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** is set to **New Quote**.
4. Click on the **row** of the quote you wish to **edit**.
5. Click on **Edit**.



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



6. The **Edit Customer Quote - QT[quote number]** screen will display.

QUOTE HEADER

Customer Heading

- **Customer:** Click on the **search button** to select an alternative Customer from the **Select a customer for this quote** list.
- **Contact Name:** Click on the **search button** to select an alternative contact for the quote.
- **Commercial:** To change the **commercial**¹ for the quote, click on the down **arrow** to select the required commercial from the list.

¹Commercial is the mark up structure for the item. The original price of the item, including the company profit margin

- The commercial linked to the selected customer would have auto populated to the commercial field.
- **Salesman:** To change the salesman responsible for the quote, click on the down **arrow** to select the salesman from the list.



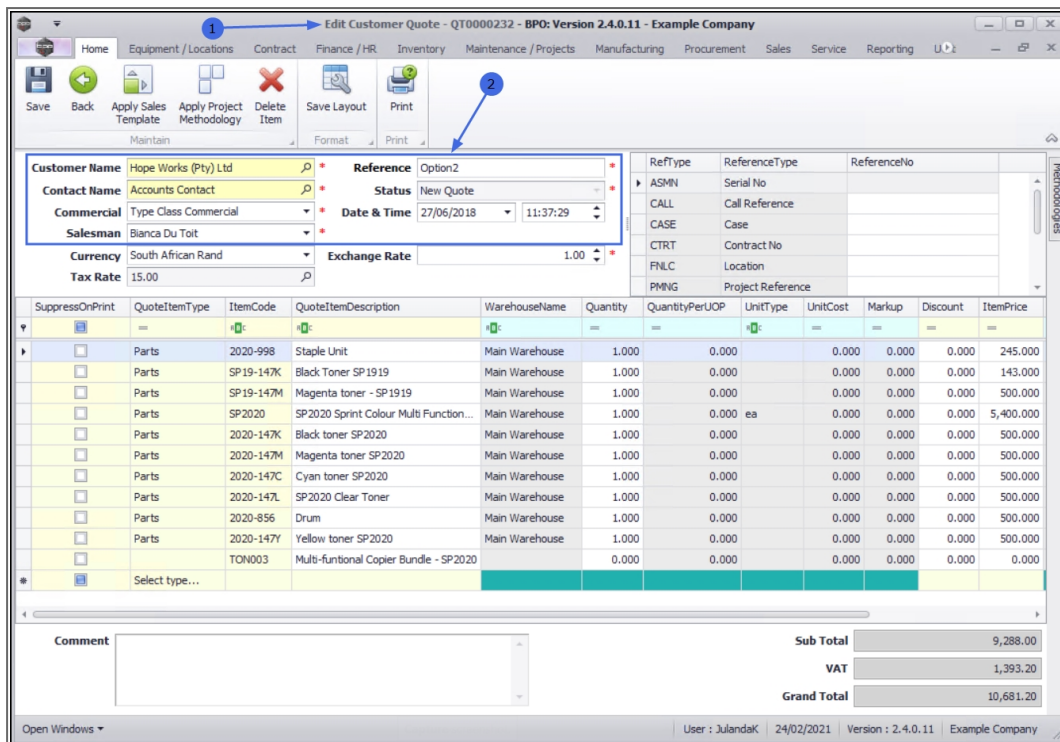
This is an important record for commission purposes.

- **Reference:** Add or make the necessary change to the reference for the quote.



The reference is very important for internal use as it is used to find and identify the quote once it has been processed.

- **Status:** This field will default to 'New Quote' and cannot be changed.
- **Date & Time:** Date and time will display the date and time the quote was created.
 - To change the Date, **type** in or click on the down **arrow** to select the date using the calendar function.
 - To change the Time, **type** in or use the directional **arrows** to select the time.



FINANCIAL HEADING

- **Currency:** The currency would have defaulted to the currency used by the customer when the quote was created. To change the currency, click on the down **arrow** to choose a different currency from the list.
- **Tax Rate:** The tax rate would have defaulted to the tax rate set up for the customer when the quote was created. This field cannot be edited.
- **Exchange Rate:** The exchange rate will display the exchange rate that was set up in the system for the customer when the quote was created. Type in or use the directional **arrows** to modify the exchange rate for the quote.

Edit Customer Quote - QT0000232 - BPO: Version 2.4.0.11 - Example Company

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

Maintain Format Print

Customer Name: Hope Works (Pty) Ltd * Reference: Option2 *
 Contact Name: Accounts Contact * Status: New Quote *
 Commercial Type Class Commercial * Date & Time: 27/06/2018 11:37:29 *
 Salesman: Bianca Du Toit *
 Currency: South African Rand * Exchange Rate: 1.00 *
 Tax Rate: 15.00 *

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	
CALL	Call Reference	
CASE	Case	
CTRT	Contract No	
FNLC	Location	
PMNG	Project Reference	

SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice
	Parts	2020-998	Staple Unit	Main Warehouse	1.000	0.000		0.000	0.000	0.000	245.000
	Parts	SP19-147K	Black Toner SP1919	Main Warehouse	1.000	0.000		0.000	0.000	0.000	143.000
	Parts	SP19-147M	Magenta toner - SP1919	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	SP2020	SP2020 Sprint Colour Multi Function...	Main Warehouse	1.000	0.000	ea	0.000	0.000	0.000	5,400.000
	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	2020-147M	Magenta toner SP2020	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	2020-147C	Cyan toner SP2020	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	2020-147L	SP2020 Clear Toner	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	2020-856	Drum	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	2020-147Y	Yellow toner SP2020	Main Warehouse	1.000	0.000		0.000	0.000	0.000	500.000
	Parts	TON003	Multi-functional Copier Bundle - SP2020		0.000	0.000		0.000	0.000	0.000	0.000
	Select type...										

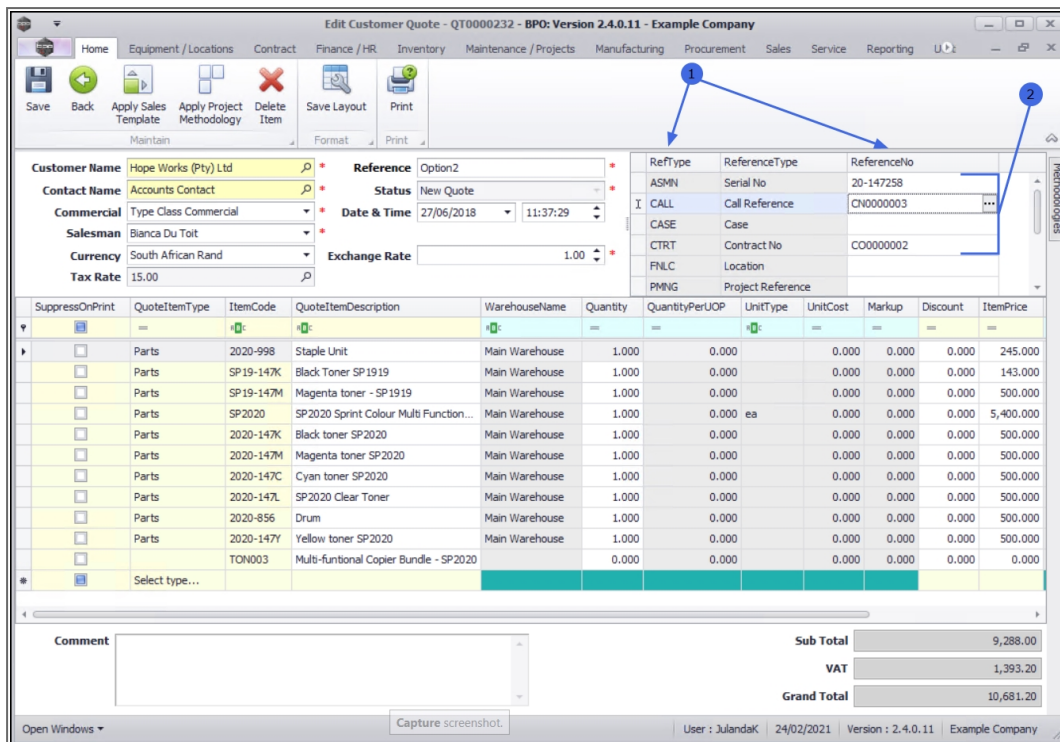
Comment

Sub Total: 9,288.00
 VAT: 1,393.20
 Grand Total: 10,681.20

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

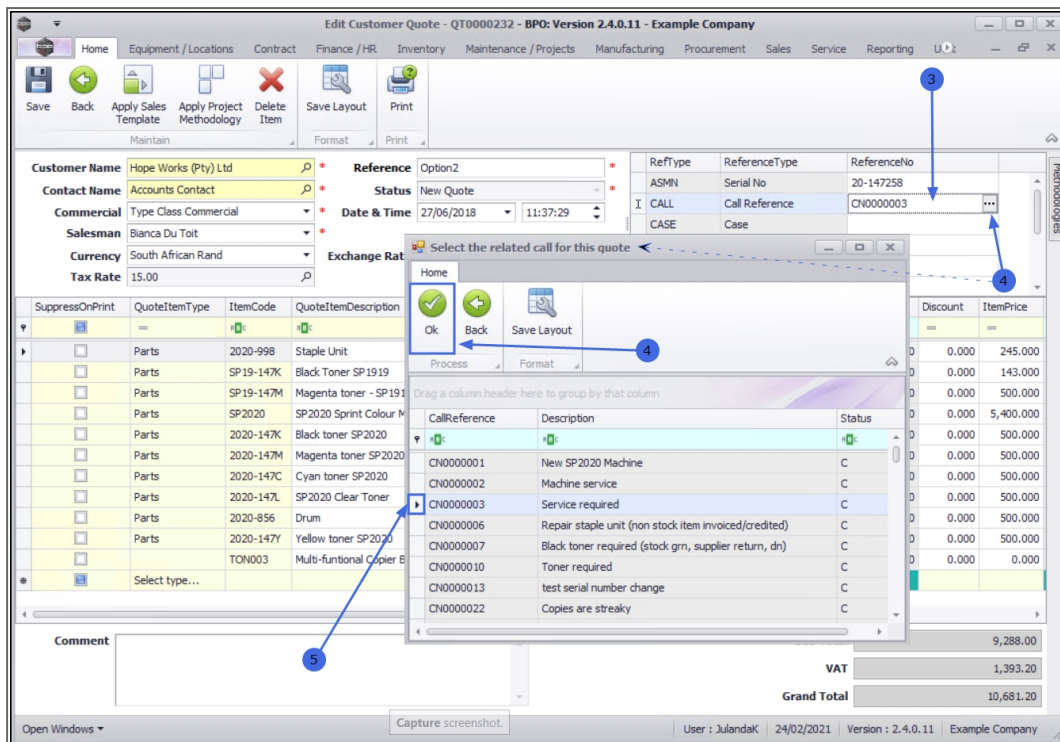
CROSS REFERENCE INFORMATION

1. From the cross reference grid you can link reference types to the quote.
2. The Reference Number column will display any Reference Types that have already been linked.



Change or Link a Reference

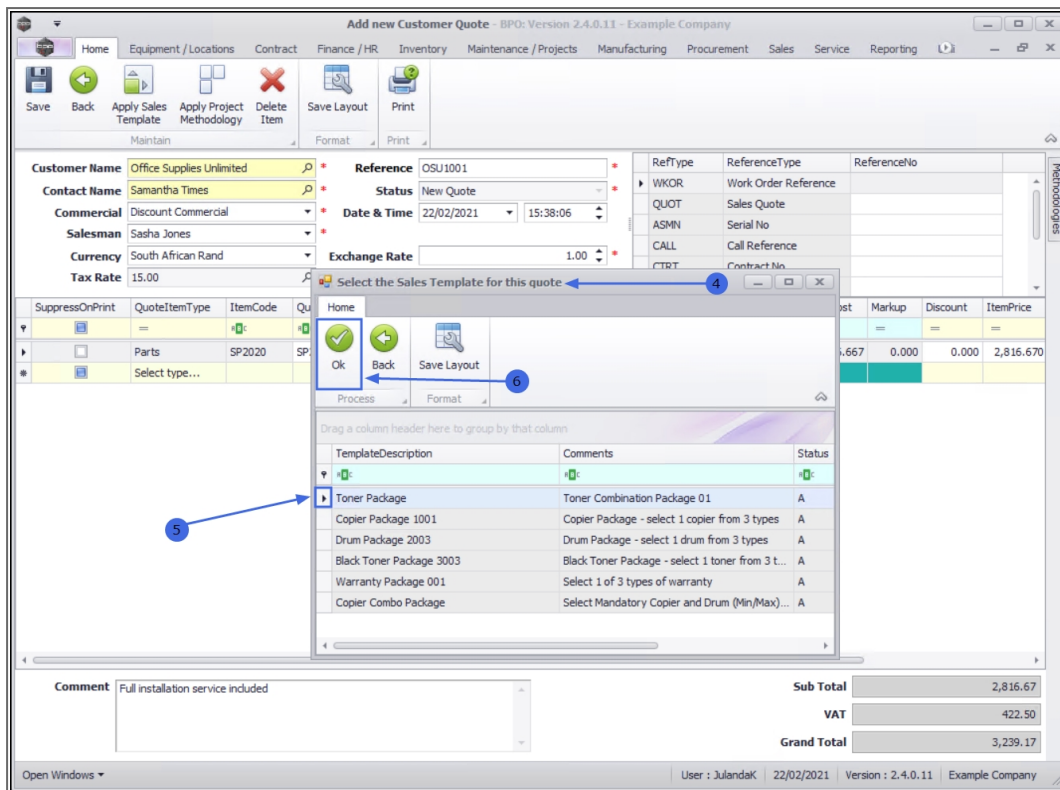
3. Click in the **Reference Number** field of the reference you wish to add or change, to display the *ellipsis* button.
4. Click on the *ellipsis* button to display the **Select the related [] for the quote** screen.
5. Click on the **row** of the reference you wish to link to the quote.
6. Click on **OK**.



QUOTE ITEM DATA GRID

Apply Sales Template

- When you click on [Quotes - Apply Sales Template](#), the quote will populate with the *Items* specified on the template you select.
- The template items will be appended to Quote Items that have already been added to the quote.
- You can add to, or remove items, as required, after which you can then adjust the quantities and selling price(s).



Apply Project Methodology

When you [Quotes - Apply Project Methodology](#) Project Methodology is applied to a quote, the system will generate sub projects and work orders as set up in the methodology layers (once the quote has been converted into a New Deal Project).

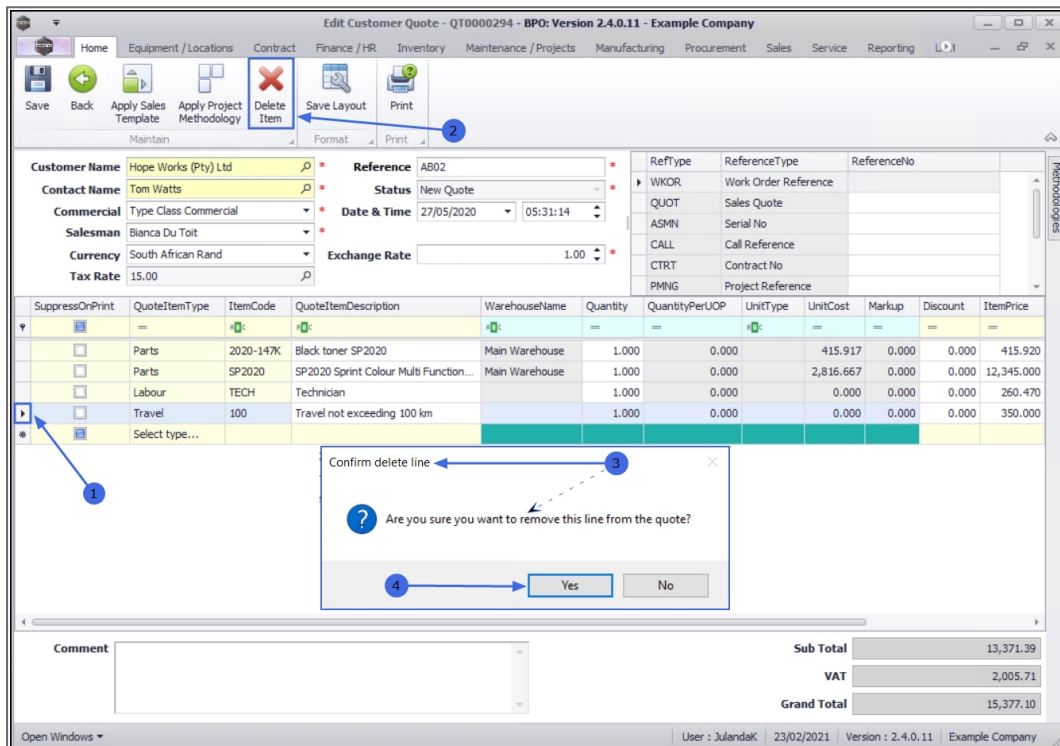
If there are resource requirements specified, then these resources will be requested.

One, or multiple methodologies can be applied to a quote.

You can apply a Project Methodology and a Sales Template to the same sales quote.

DELETE QUOTE ITEM

1. Click on the **row** of the quote item you wish to delete.
2. Click **Delete Item**.
3. When you receive the **Confirm delete line** message to confirm;
 - **Are you sure you want to remove this line from the quote?**
4. Click on **Yes**.



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

Reference: AB02
 Status: New Quote
 Date & Time: 27/05/2020 05:31:14
 Exchange Rate: 1.00

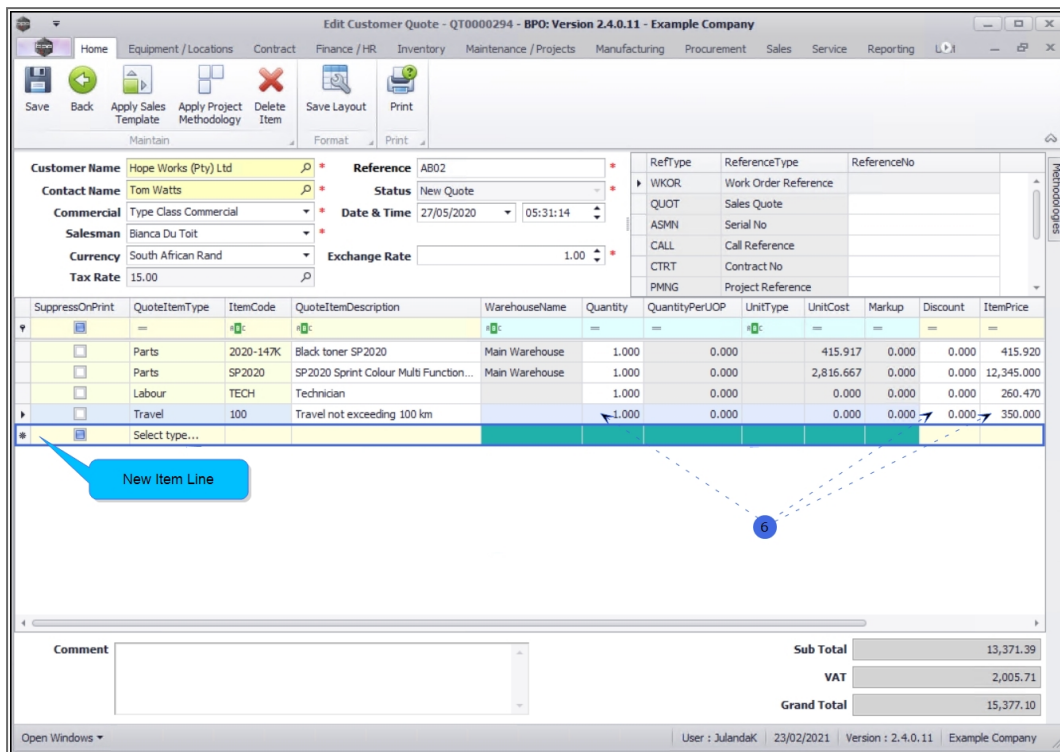
SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice
	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000	0.000		415.917	0.000	0.000	415.920
	Parts	SP2020	SP2020 Sprint Colour Multi Function...	Main Warehouse	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

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

ADD QUOTE ITEM

5. Click anywhere in the Item line grid or press **Tab** at the end of the previous quote item to open a new item line.
6. Make the necessary changes to the **Quantity**, **Discount** and **Unit Selling Price** by clicking in the text box and **type** or use the **directional arrows** to enter the correct amounts.

Click here for information on how to "Add Quote Item" on page 7(s) to the Quote.



EDIT COMMENTS

- Click in the Comments text box to add a comment or to make changes to an existing comment. The comment will display on the *quote document*.

SAVE QUOTE

- When you have finished making the required changes, click **Save**.

Edit Customer Quote - QT0000294 - BPO: Version 2.4.0.11 - Example Company

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

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

Customer Name: Hope Works (Pty) Ltd Reference: AB02 Status: New Quote

Contact Name: Tom Watts Date & Time: 27/05/2020 05:31:14

Commercial Type Class Commercial Salesman: Bianca Du Toit

Currency: South African Rand Exchange Rate: 1.00

Tax Rate: 15.00

RefType	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
	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
	Expenses	TOLL	Toll		1.000	0.000		0.000	0.000	0.000	25.000
	Select type...										

Comment

Sub Total: 13,046.39

VAT: 1,956.96

Grand Total: 15,003.35

User: JulandaK 23/02/2021 Version: 2.4.0.11 Example Company

9. You will return to the **Sales Quotes** listing screen.

Sales Quotes - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Durban 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
QT0000275	BOT0001	Bothas Networking Inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A
QT0000276	BOT0001	Bothas Networking Inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A
QT0000277	APP0001	Apple Juice Inc	Test Quote	6,509.54	ZAR	1.00	15.00	21/08/2019	Bianca Du Toit		N	A
QT0000278	BEA001	Bearing and Shoe	12345	9,292.54	ZAR	1.00	15.00	27/08/2019	Bianca Du Toit		N	A
QT0000280	BIL0001	Billys Barn	7896	0.00	ZAR	1.00	15.00	24/01/2020	Bianca Du Toit		N	A
QT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/2020	Bianca Du Toit		N	A
QT0000292	BIG0001	Big Bargains	AB01_SalesStudio	241,500.00	ZAR	1.00	15.00	27/05/2020	Abigail Milne		N	A
QT0000293	HOP001	Hope Works (Pty) Ltd	AB01_CloneQu...	15,377.10	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A
QT0000294	HOP001	Hope Works (Pty) Ltd	AB02	15,003.35	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A
QT0000295	APP0001	Apple Juice Inc	123789_CloneQ...	17,500.47	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A
QT0000296	HOP001	Hope Works (Pty) Ltd	AB012	15,855.41	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned	N	A
QT0000297	HOP001	Hope Works (Pty) Ltd	AB13	15,825.45	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned quote ...	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
QT0000299	HOP001	Hope Works (Pty) Ltd	AB016	15,662.06	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned,...	N	A
QT0000300	HOP001	Hope Works (Pty) Ltd	AB017	259,864.04	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned a quot...	N	A
QT0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242,921.94	ZAR	1.00	15.00	10/07/2020	Bianca Du Toit	Text	N	A
QT0000302	HOP001	Hope Works (Pty) Ltd	Test Marc 02	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A
QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test M...	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A
QT0000306	SWE0001	Sweets	Test Default Ite...	2,794.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A
QT0000309	HOT0001	Hot Pink	Test Matt02	2,150.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A
QT0000310	DER001	Derton / Technologies	Test Matt03	299.54	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A

User: JulandaK 17/09/2021 Version: 2.5.0.4 Example Company v2.5.0.0

VIEW QUOTE IN CRM

The updated quote will pull through to **CRM** where it can be viewed.

Related Topics

- [Apply a Sales Template](#)
- [Apply a Project Methodology](#)
- [Print Sales Quote](#)
- [View Quote in CRM](#)

MNU.062.007