

SALES

QUOTES – APPLY PROJECT METHODOLOGY

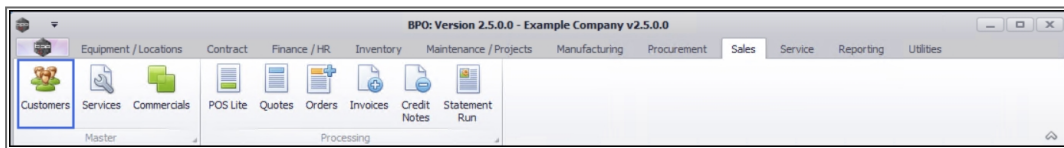
When a Project Methodology is applied to a quote, the system will generate **sub projects** and **work orders** as set up in the **methodology layers**, once the quote has been converted into a New Deal Project.

If **resource requirements** were specified, then these will be requested.

A single- or multiple methodologies can be applied to a quote.

Both Methodologies and Sales Templates can be applied to the same sales quote.

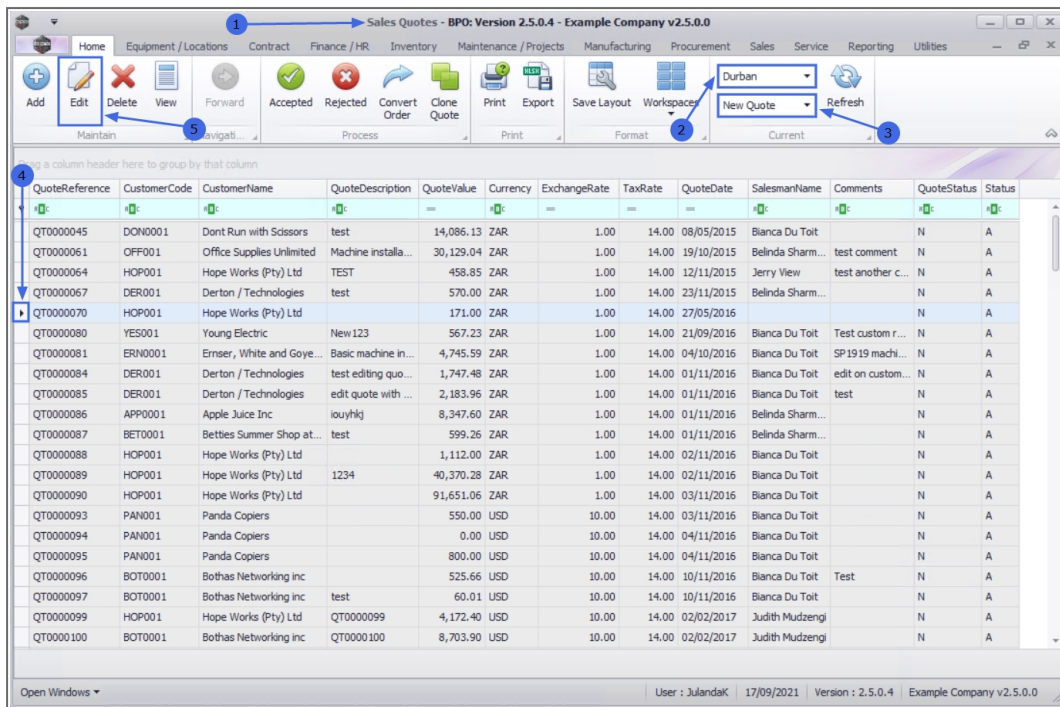
Ribbon Access: *Maintenance / Projects > Projects*



1. The **Sales Quotes** Listing screen will be displayed.
2. Select the **Site** where the quote can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **New Quote**.
4. Click on the **row** of the quote you wish to apply a Methodology to.
5. Click on **Edit**.

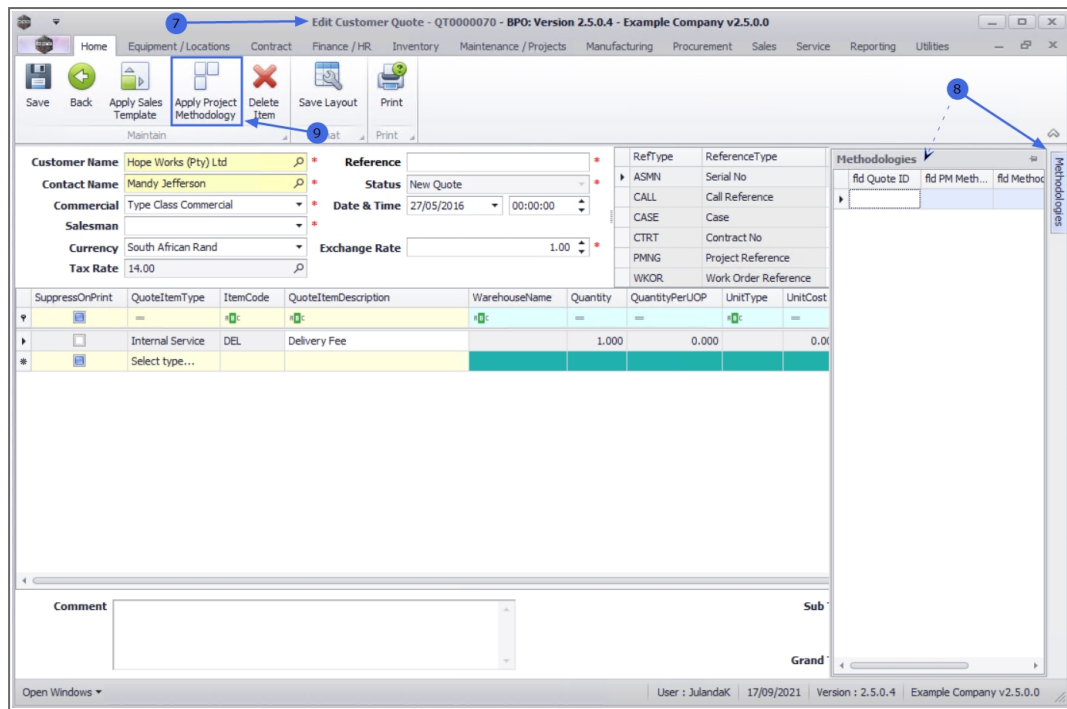


Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.

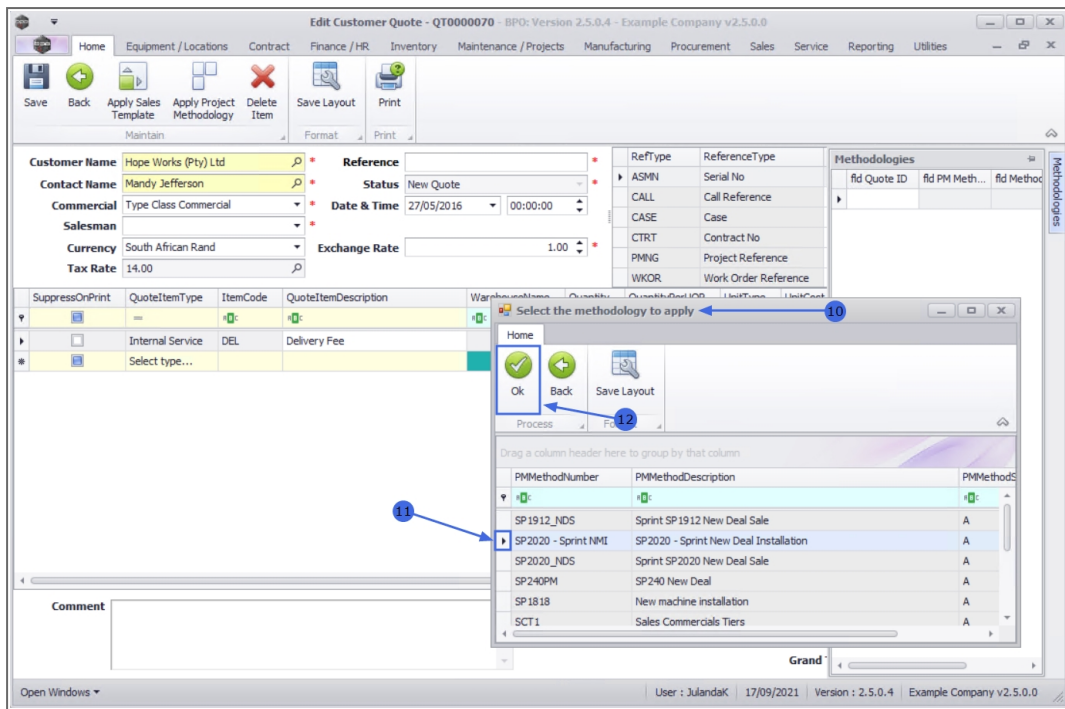


QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000045	DON0001	Dont Run with Scissors	test	14,086.13	ZAR	1.00	14.00	08/05/2015	Bianca Du Toit		N	A
QT0000061	OFF001	Office Supplies Unlimited	Machine installa...	30,129.04	ZAR	1.00	14.00	19/10/2015	Belinda Sharm...	test comment	N	A
QT0000064	HOP001	Hope Works (Pty) Ltd	TEST	458.85	ZAR	1.00	14.00	12/11/2015	Jerry View	test another c...	N	A
QT0000067	DER001	Derton / Technologies	test	570.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm...		N	A
QT0000070	HOP001	Hope Works (Pty) Ltd		171.00	ZAR	1.00	14.00	27/05/2016			N	A
QT0000080	YES001	Young Electric	New 123	567.23	ZAR	1.00	14.00	21/09/2016	Bianca Du Toit	Test custom r...	N	A
QT0000081	ERN0001	Ernsar, White and Goye...	Basic machine in...	4,745.59	ZAR	1.00	14.00	04/10/2016	Bianca Du Toit	SP 1919 machi...	N	A
QT0000084	DER001	Derton / Technologies	test editing quo...	1,747.48	ZAR	1.00	14.00	01/11/2016	Bianca Du Toit	edit on custom...	N	A
QT0000085	DER001	Derton / Technologies	edit quote with ...	2,183.96	ZAR	1.00	14.00	01/11/2016	Bianca Du Toit	test	N	A
QT0000086	APP0001	Apple Juice Inc	iouyhjg	8,347.60	ZAR	1.00	14.00	01/11/2016	Belinda Sharm...		N	A
QT0000087	BET0001	Betties Summer Shop at...	test	599.26	ZAR	1.00	14.00	01/11/2016	Belinda Sharm...		N	A
QT0000088	HOP001	Hope Works (Pty) Ltd		1,112.00	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	A
QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	A
QT0000090	HOP001	Hope Works (Pty) Ltd		91,651.06	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		N	A
QT0000093	PAN001	Panda Copiers		550.00	USD	10.00	14.00	03/11/2016	Bianca Du Toit		N	A
QT0000094	PAN001	Panda Copiers		0.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	A
QT0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	A
QT0000096	BOT0001	Bothas Networking inc		525.66	USD	10.00	14.00	10/11/2016	Bianca Du Toit	Test	N	A
QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	A
QT0000099	HOP001	Hope Works (Pty) Ltd	QT0000099	4,172.40	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A
QT0000100	BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A

7. The **Edit Customer Quote - QT[quote number]** will be displayed.
8. Click on the **Methodologies** tab to view any project methodologies that have already been linked.
9. Click on **Apply Project Methodology**.



10. The **Select the methodology to apply** screen will display.
11. Click on the **row** of the Project Methodology you wish to apply to the quote.
12. Click on **OK**.



13. The Quote will be updated and the tasks defined by the methodology will be appended to any existing quote items that have already been created.
14. The **Methodologies frame** has also been updated with the Methodology information selected.
15. You may now proceed to edit Quote Item(s) or "Delete Quote Item" on page 9(s) as required.
16. When done editing the Quote, click on **Save** to return to the Sales Quotes listing screen.

Edit Customer Quote - QT0000070 - 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

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

Customer Name: Hope Works (Pty) Ltd
 Contact Name: Mandy Jefferson
 Commercial: Type Class Commercial
 Salesman:
 Currency: South African Rand
 Tax Rate: 14.00

Reference: New Quote
 Status: New Quote
 Date & Time: 27/05/2016 00:00:00
 Exchange Rate: 1.00

Methodologies

Quote ID	fd PM Method ID	fd Method No	fd Method Desc
70	80	SP2020 - Sprint NMI	SP2020 - Sprint Ne...

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	Quantit
<input type="checkbox"/>	Internal Service	DEL	Delivery Fee		1.000	
<input type="checkbox"/>	Parts	SP2020	SP2020 Sprint Colour MF Copier	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	2020-147M	Magenta toner SP2020	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	2020-147C	Cyan toner SP2020	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	2020-147Y	Yellow toner SP2020	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	SP2020	SP2020 Sprint Colour MF Copier	Main Warehouse	0.000	
<input type="checkbox"/>	Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	SP19-147K	Black Toner SP1919	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	SP19-147K	Black Toner SP1919	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	SP19-147C	Cyan Toner - SP1919	Main Warehouse	1.000	
<input type="checkbox"/>	Parts	SP19-147C	Cyan Toner - SP1919	Main Warehouse	1.000	

Comment

Open Windows

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

MNU.062.010

