SALES

QUOTES - APPLY PROJECT METHODOLOGY

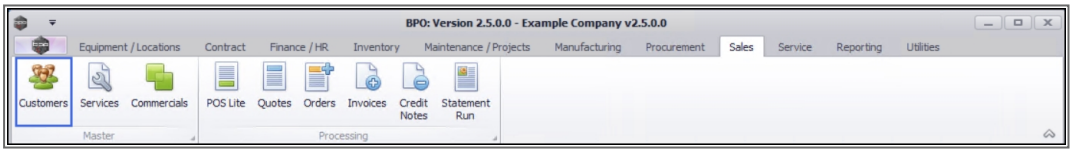
When a Project Methodology is applied to a quote, the system will generate **sub projects** and **work orders** as set up in the **methodology layers**, once the quote has been converted into a New Deal Project.

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***.

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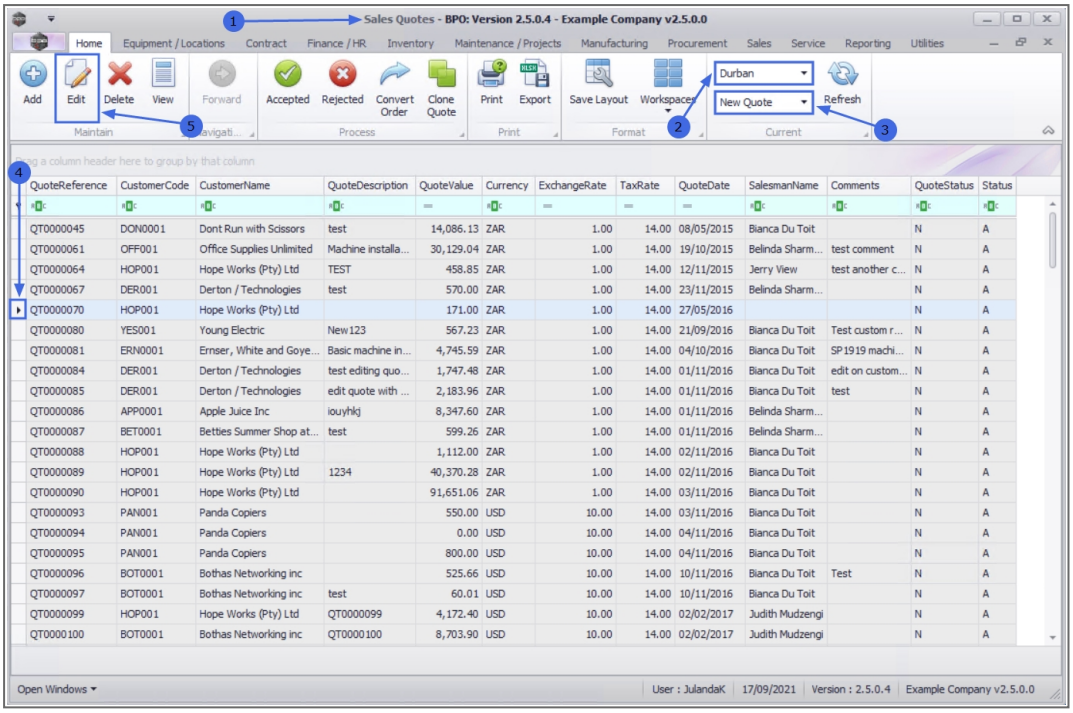

7. The ***Edit Customer Quote - QT[****quote number****]*** will be displayed.
8. Click on the ***Methodologies*** tab to view any project methodologies that have already been linked.
9. Click on ***Apply Project Methodology***.

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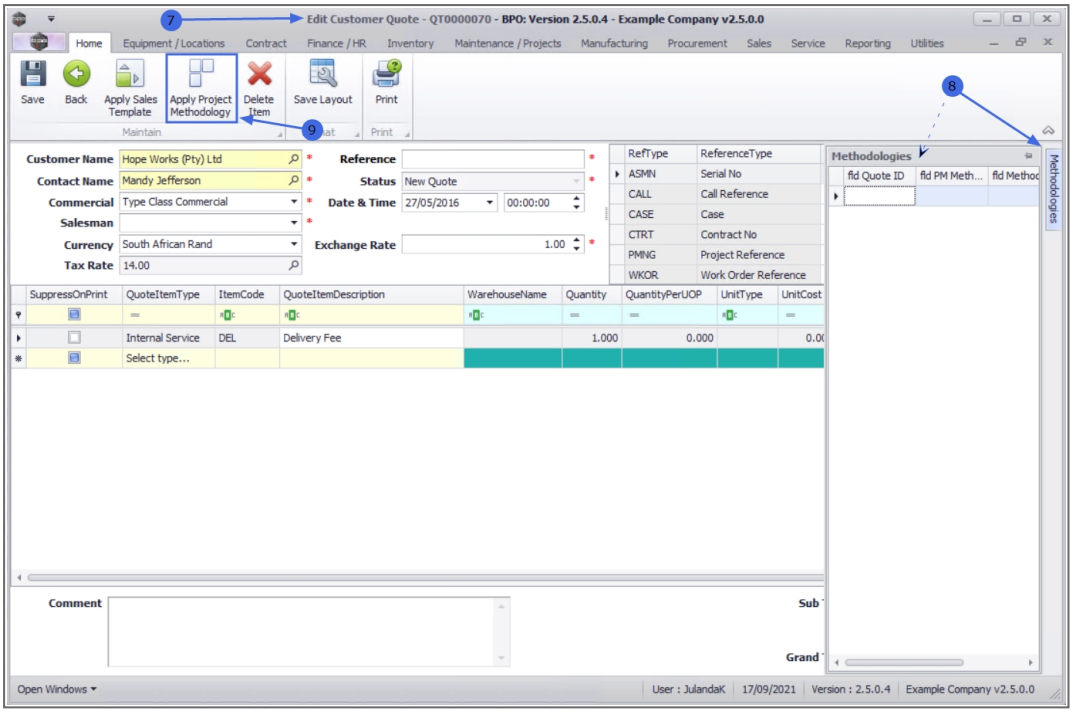

10. The ***Select the methodology to apply*** screen will display.
11. Click on the ***row*** of the Project Methodology you wish to apply to the quote.
12. Click on ***OK***.

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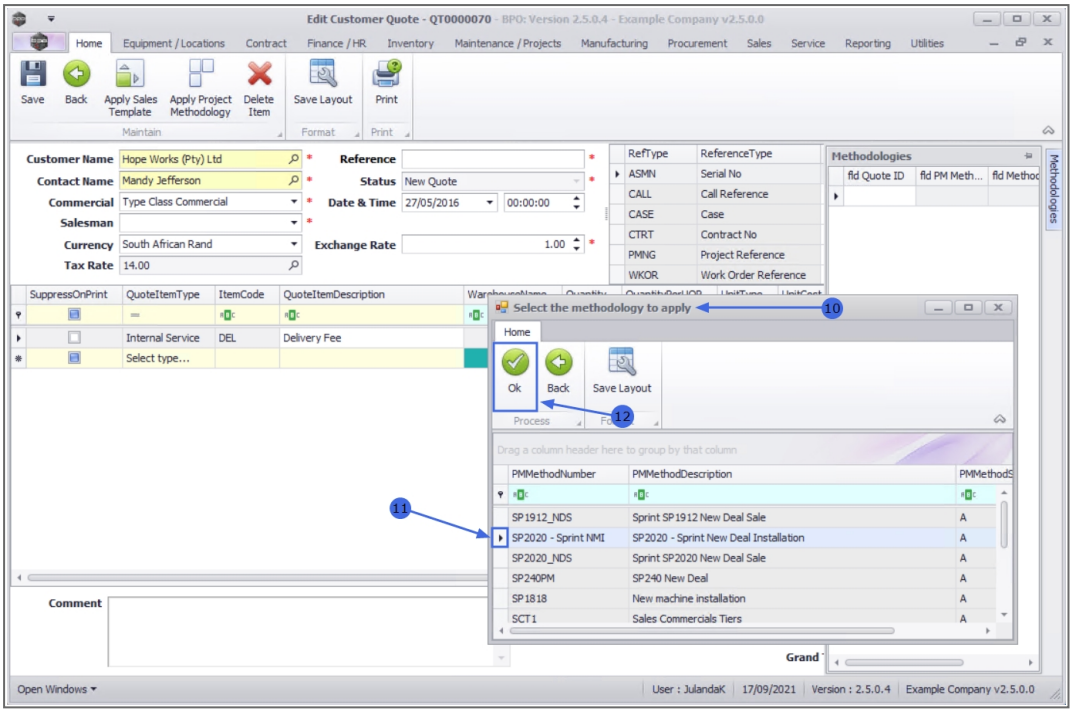

13. The Quote will be updated and the tasks defined by the methodology will be appended to any existing quote items that have already been created.
14. The ***Methodologies frame*** has also been updated with the Methodology information selected.
15. You may now proceed to edit Quote Item(s) or "Delete 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.

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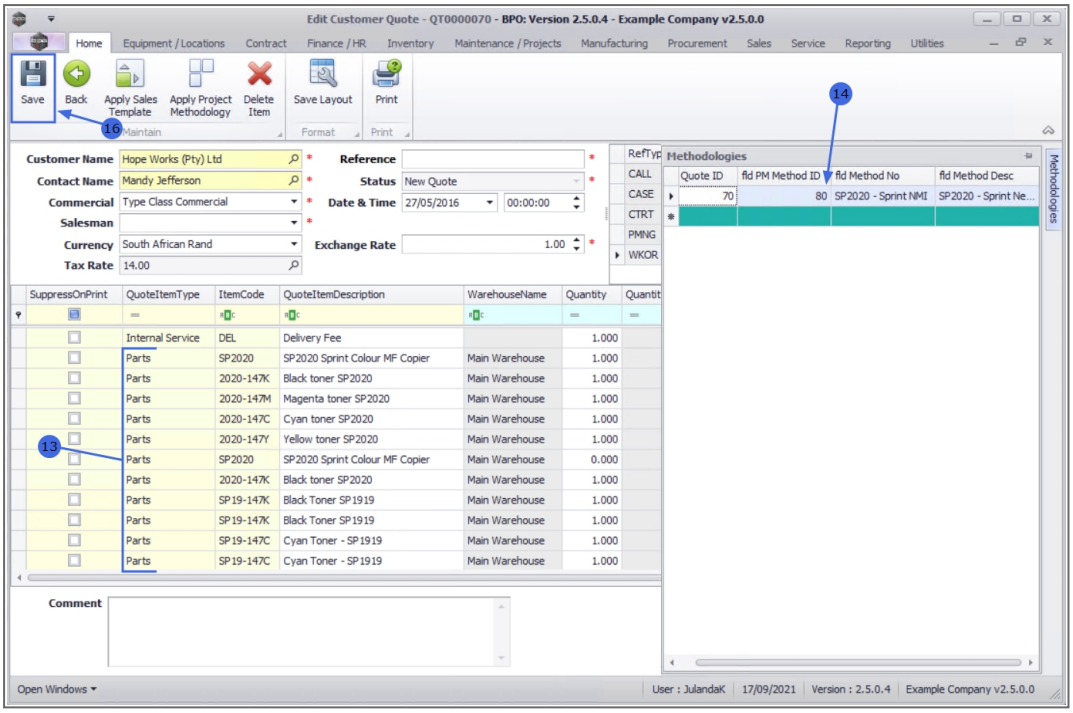

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