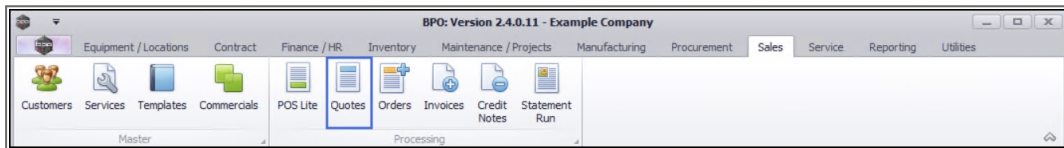


SALES

QUOTES – VIEW SALES QUOTE

Ribbon Access: Sales > Quotes

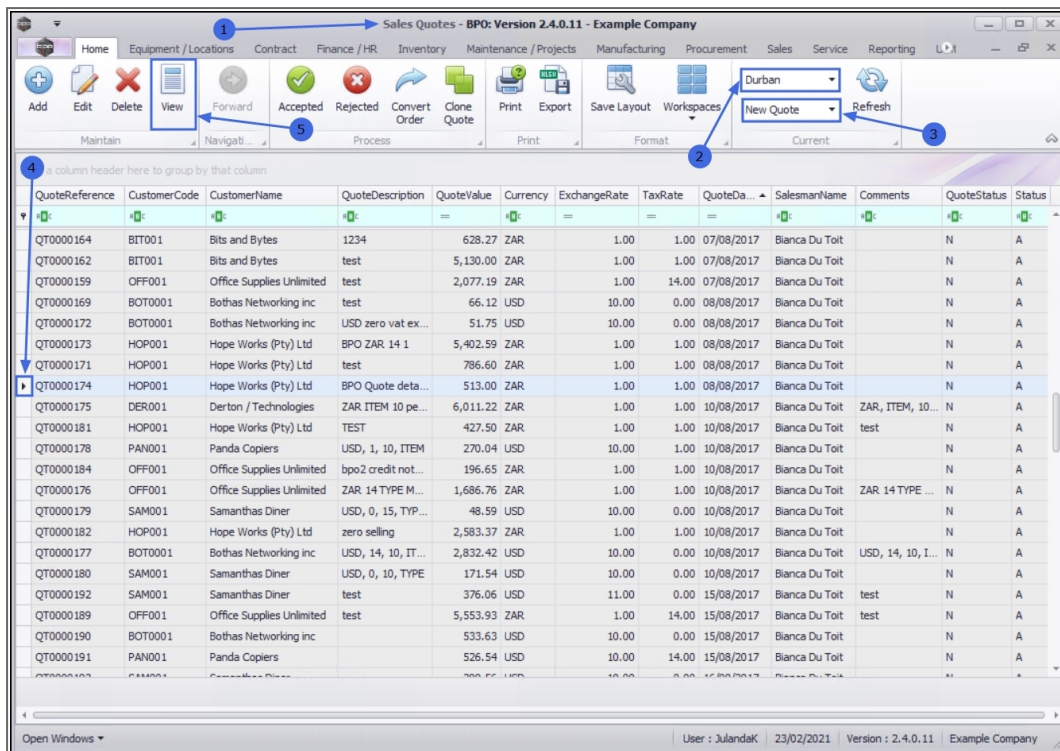


1. The **Sales Quotes** listing screen will display.
2. Select the **Site** the quote was created for.
 - The example has **Durban** selected.
3. Select the Status for the Sales Quote you wish to view.



Note that a Sales Quote can be **viewed** in any **Status**.

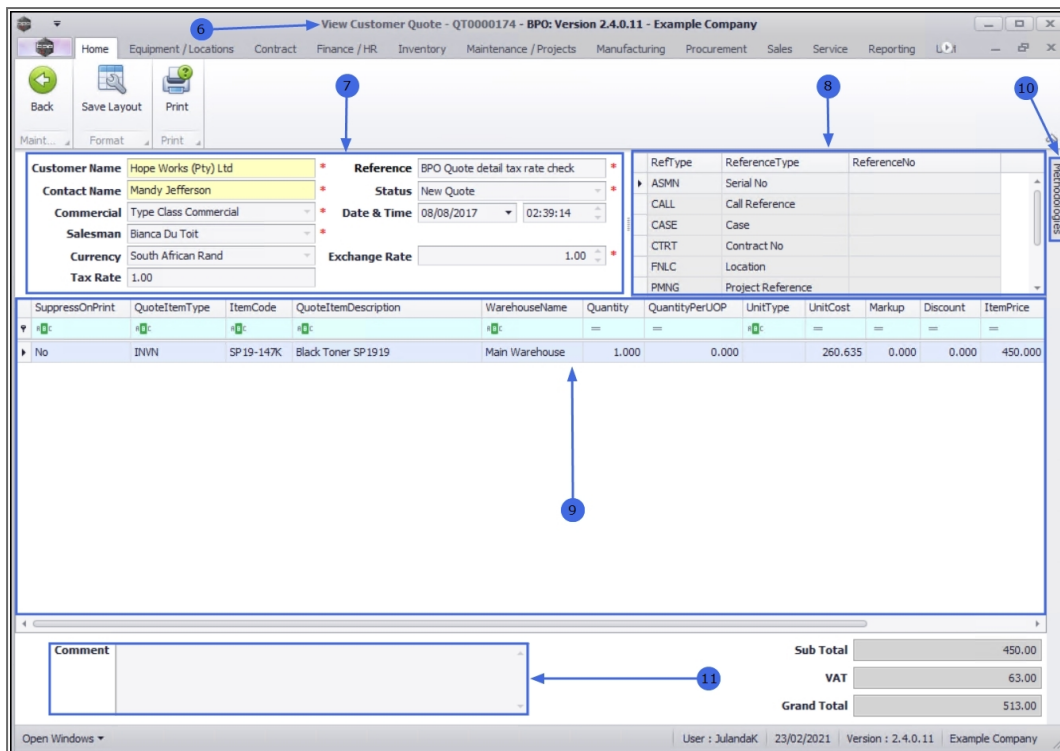
- The example has **New Quote** selected.
4. Click on the **row** of the quote you wish to view.
 5. Click on **View**.



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

The Customer Quote contains:

7. The Customer Details frame,
8. The Related References frame,
9. The Quote Items frame,
10. The Methodologies tab and
11. The Comments field.



VIEW METHODOLOGIES

1. Click on the **Methodologies** tab, to expand the frame.
2. Any methodologies linked to the quote will be listed.
3. Clicking anywhere outside the Methodologies frame will **hide the frame**.
4. To keep the frame from closing, **pin the frame** to the screen by clicking on the pin button. Clicking on the pin again, will allow you to close the frame once again.

View Customer Quote - QT0000109 - BPO: Version 2.4.0.11 - Example Company

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

Back Save Layout Print

Customer Name: Hope Works (Pty) Ltd * Reference: test quote with more than 20 char *
 Contact Name: Mandy Jefferson * Status: New Quote *
 Commercial: * Date & Time: 02/03/2017 10:04:13 *
 Salesman: Judith Mudzengi *
 Currency: US Dollar * Exchange Rate: 10.00 *
 Tax Rate: 14.00 *

Methodologies

Ref	Methodologies
fd Quote ID	fd PM Method ID

Click here to hide the Methodologies frame if it has not been pinned

SuppressOnPrint	QuoteItem Type	Item Code	QuoteItem Description	Warehouse Name	Quantity	Quar
No	INVN	SP2020	SP2020 Sprint Colour Multi Function...	George_Whse	1.000	
No	INVN	2020-147K	Black toner SP2020	Main Warehouse	1.000	

Comment

Open Windows User: Julandak 23/02/2021 Version: 2.4.0.11 Example Company

Related Topics

- [Print a Sales Quote](#)

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