

# SERVICE

# **WORK ORDERS - SALES QUOTES**

If additional work is required, that is not covered within the service contract, then a quote can be raised for the customer. The customer needs to however approve the quotation on the work order first.

#### Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site*.
  - The example has *Durban* selected.
- 3. Change the *Status* to *Open*.
- Click on the *row* of the *work order* you wish to create a sales quotes for.
- 5. Click on the *Quotes* tile.



### Work Orders - Sales Quotes

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- 6. The *Sales Quotes for Work Order [work order number]* screen will be displayed.
- 7. Any quotes that have already been created for the work order, will be listed on this screen.

### **ADD SALES QUOTE**

8. Click on Add.

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





- 9. "The Add new Customer Quote screen will display." on page 2
- 10. You have the option to Quotes Apply Sales Template or Projects -Apply Project Methodology to the sales quote.

#### **CROSS REFERENCE**

- 11. This frame will display all the *linked references* linked to this project, e.g. call number, serial number.
- 12. When a quote is created for a work order from the Project Listing screen, then the *Work Order Reference* number will be auto linked to the quote.
- 13. When you have completed the quote information, click on *Save*.



Customer Name         Office Supples Unlimited         P         Reference         WorkOnde         Reference         Reference		
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You will return to the *Sales Quotes for Work Order* screen.

## **EDIT QUOTE**

Only Quotes with a *N* - *New Quote* in the *Quote Status* column can be edited.

- 1. From the *Sales Quotes for Work Order Code [work order number]* screen,
- 2. Click on the *row* of the Quote you wish to make changes to.
- 3. Click on *Edit*.

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



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- "The Edit Customer Quote QT[quote number] screen will display." on page 2
  - You have the option to Quotes Apply Sales Template as well as Quotes Apply Project Methodology to the Quote.
  - Make changes to the *Heading Information* or to Items in the *Sales Items grid*.
- Click on *Save* to save the changes and to return to the *Sales Quotes* for *Project* listing screen.



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### **DELETE QUOTE**

Only Quotes with a *N* - *New Quote* in the *Quote Status* column can be deleted.

- 1. From the Sales Quotes for Work Order [work order number] screen,
- 2. Click on the *row* of the Sales Quote you wish to *remove*.
- 3. Click on *Delete*.

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

- 4. When you receive the *Confirm delete quote* message to confirm;
  - Are you sure you want to delete this quote?
- 5. Click on Yes.



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The *Status* for the Sales Quote on the *Sales Quotes for Work Order* screen has changed from **A-Active** to **I-Inactive**.

### **VIEW QUOTE**

A Quote in any *Quote Status* can be Viewed.

- 1. From the Sales Quotes for Work Order [work order number] screen,
- 2. Click on the *row* of the Sales Quote you wish to *view*.
- 3. Click on *View*.



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



5. Click on *Back* to return to the *Sales Quotes for Customer* listing screen.



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## FORWARD NAVIGATION

The *Forward* navigation button is only available in the *Invoiced Quote* status after the Sales Quote has been Converted to Order. This feature enables the user to quickly navigate to related documentation. You can navigate to the Sales Orders listing screen where you can view the Sales Order that has been created for the selected Sales Quote.

- 1. From the Sales Quotes for Work Order screen,
- 2. Click on the *row* of the Invoiced Quote you wish to view.
- 3. Click on *Forward* to navigate to the Sales Orders listing screen.

If the Forward navigation is available (not greyed out) then further downstream process documents related to the selected order is available and you can thus navigate to those downstream documents, e.g. the linked *Sales Invoice*, the new deal Call or Project.



Home       Equipment / Locations       Contract       Finance / HR       Inventory       Maintenance / Projects       Manufacturing       Procurement       Sales       Service       Reporting         Add       Edit       Delete       Wew       Image: Contract       Forward       Image: Contract       Image: Contract       Forward       Image: Contract	Utilities	- & x
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### **BACK NAVIGATION**

4. The *Back* navigation button is available and by clicking on it, you can navigate back until you return to the *Sales Quotes* listing screen.



### Work Orders - Sales Quotes

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### **ACCEPT QUOTE**

Only quotes with a *N* - *New Quote* in the *Quote Status* can be Accepted.

- 1. From the Sales Quotes for Work Order [work order number] screen,
- 2. Click on the *row* of the Sales Quote you wish to *accept*.
- 3. Click on *Accepted*.

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

- 4. When you receive the *Input Validation* message to confirm;
  - Are you sure you want to update this quote, no. [quote number] to be Accepted? Answer 'Yes' to mark it as Accepted.
- 5. Click on Yes.



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The Quote Status for the selected Quote has changed to **[A] - Accepted** on the **Sales Quotes for Customer** listing Screen.

### **REJECT QUOTE**

A quote can be rejected from the *Sales Quotes for Customer* listing screen where the Quote Status is set to [*N*] - *New Quote* or [*A*] - *Accepted*.

- 1. From the Sales Quotes for Work Order [work order number] screen,
- 2. Click on the *row* of the Sales Quote that needs to be *rejected*.
- 3. Click on *Rejected*.

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

- 4. When you receive the *Input Validation* screen to confirm;
  - Are you sure you want to update this quote, no. [quote number] to be Rejected? Answer 'Yes' to mark it as Rejected.



#### 5. Click on Yes.

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The Quote Status for the selected Quote has changed to **[R] - Rejected** on the **Sales Quotes for Customer** listing Screen.

### **CONVERT QUOTE TO ORDER**

A quote can be converted to a sales order from the *Sales Quotes for Customer* listing screen where the Quote Status is set to [*N*] - *New Quote* or [*A*] - *Accepted*.

- 1. From the Sales Quotes for Project [project ref number] screen,
- Click on the *row* of the Sales Quote that you wish to *convert* to a sales order.
- 3. Click on *Convert Order*.

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

You will receive *three (3)* prompt messages to confirm the transaction:



- 4. When you receive the first *Order Generation* message to confirm;
  - Are you sure you want to convert quote [quote number], for Customer [customer name] to an order?
- 5. Click on Yes.

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- 6. The second *Order Generation* message will confirmation;
  - Do you wish to close the quote [quote number] off? No further orders will be possible from this quote if it is closed.
- 7. Click on Yes.



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- 8. The third *Order Generation* message will confirm;
  - Do you wish to view the order created, no. [order number]?
- 9. Click **Yes** to view the order.
  - Selecting No will leave you on the Sales Quotes for Cus-

tomer screen.



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The *Sales Orders* listing screen will display the a list of all *New Orders* for the *Site* you have selected.

For a detailed handling of this topic refer to Quotes - Convert to Sales Order

### **CLONE A QUOTE**

The nature of cloning a quote is to *save time* when creating new quotes for customers. Using this method, ensures that most of the details of the quote would remain the same. You may wish to *edit* some of the details, for example, the customer, the discount amount or *add* items such as a warranty to the quote.

- 1. From the Sales Quotes for Work Order [work order number] screen,
- 2. Select the *row* of the quote you wish to clone.
- 3. Click on *Clone Quote*.

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



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

It is important that a <u>new</u> *Reference* is entered as it is used to find and identify the quote once it has been processed.

- 5. You can edit any of the *Customer Heading*, *Financial Heading* or *Cross Reference* details, if required.
- 6. Edit the *Line Item details*, if required.
- You can also choose to apply a Quotes Apply Sales Template, which will be appended to the existing quote items, as well as Quotes - Apply Project Methodology to the cloned quote, if required.

For a detailed handling of this topic refer to Quotes - Clone a Quote

8. Click on *Save* when done.



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### **PRINT QUOTE**

- 1. From the Sales Quotes for Work Order [work order number] screen,
- 2. Click on the *row* of the Quote you wish to print.
- 3. Click on **Print**.



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Open Windows 🕶								Use	er : JulandaK	31/03/2022 V	ersion : 2.5.0.8	Example Comp	bany v2.5.	0.8

- The *Select the option as desired* message screen will display with the following options;
  - Fint Quote will open the Sales Quote in the Preview screen to view, print, export or email.
  - Email Quote will allow you to add recipients and the system will create a .PDF of the Sales Quote as an Attachment to the email.
  - Fint and Email Quote will display both the Report Pre-

view and Email screens.

5. Click on the *radio button* of the option you require.

When selecting to *Email the Quote*, the quote will be emailed via the *BPO Email Service* on the server (not from MS Outlook).

• The example has *Print Quote* selected.



6. Click on *Accept*.

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- 7. The Sales Quote will display in the *Preview* screen.
- From this screen you can make cosmetic changes to the document, as well as *Save*, *Print*, *Export*, *Add a Watermark* or *Email* the Sales Quote.
- 9. Click *Close* to return to the *Sales Quotes for Work Order* screen.



#### Work Orders - Sales Quotes



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