

## SERVICE

### MY WORK – ADD A QUOTE

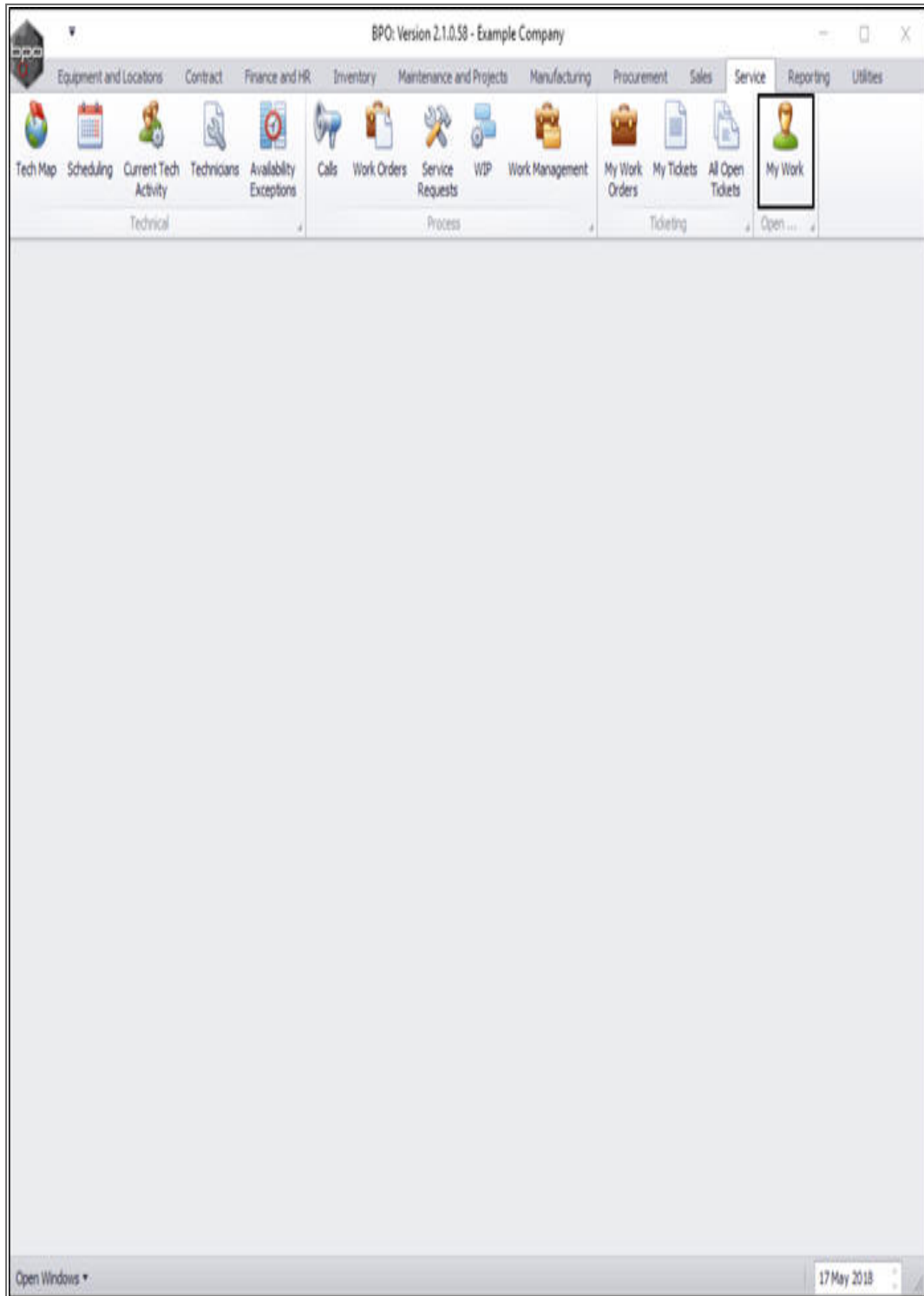
You may need to raise a quote for additional work that must be done, but needs approval from the client, as it will be billed.

When using the **Email** option to send a Sales Quote, please note that it will be mailed via the **BPO Email Service** on the server (not from your own MS Outlook).

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***Ribbon Access:*** Service > My Work

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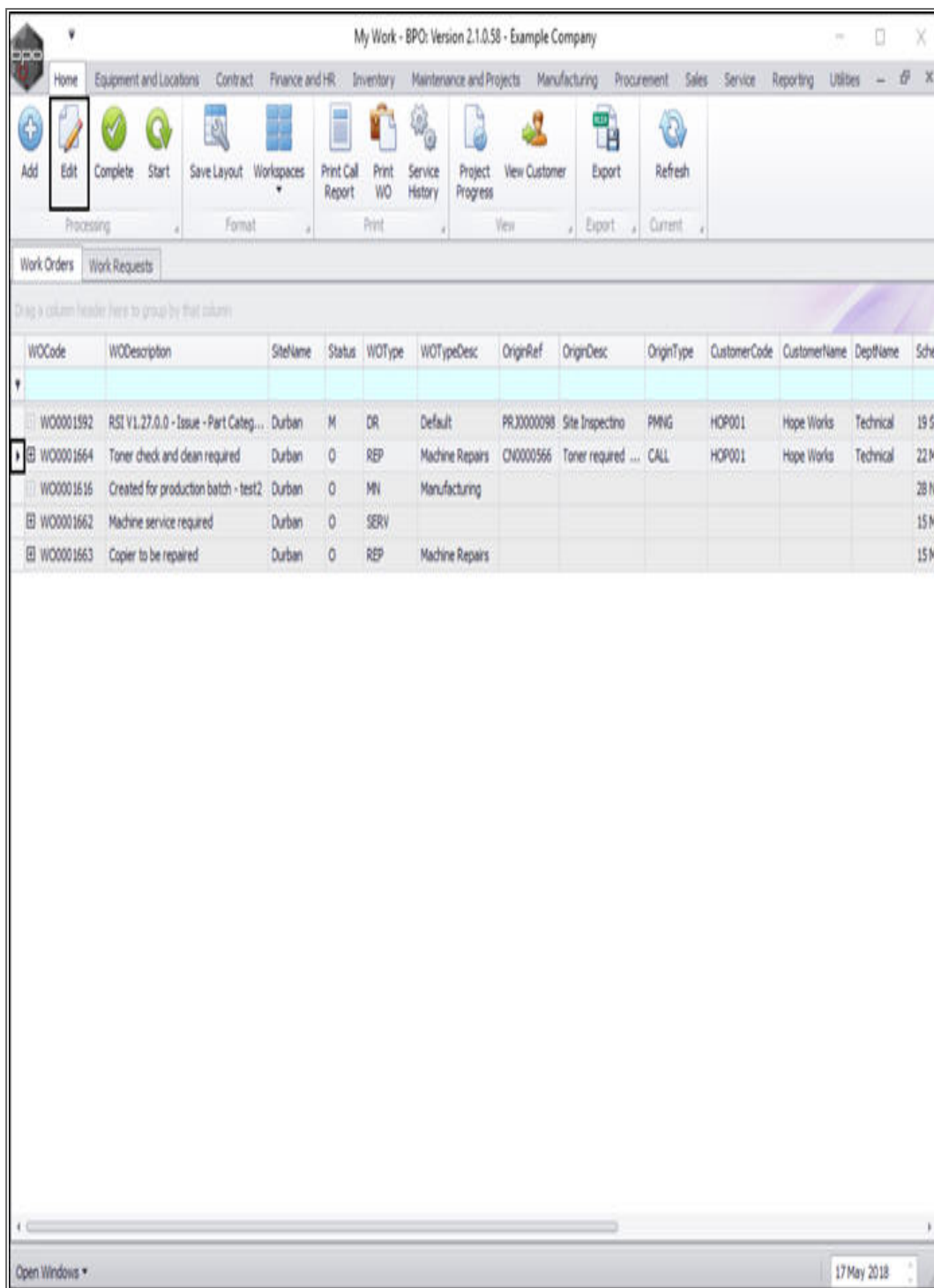


The **My Work** listing screen will be displayed.

## ADD A QUOTE

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- Click on the ***row selector*** in front of the ***work order*** where you wish to ***raise a quote***.
- Click on ***Edit***.



WOCODE	WODescription	SiteName	Status	WOTYPE	WOTYPEDESC	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	Sched
WO0001592	RSL V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PR0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	19 Se
WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	ON0000566	Toner required ...	CALL	HOP001	Hope Works	Technical	22 M
WO0001616	Created for production batch - test2	Durban	O	MM	Manufacturing							28 N
WO0001662	Machine service required	Durban	O	SERV								15 M
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15 M

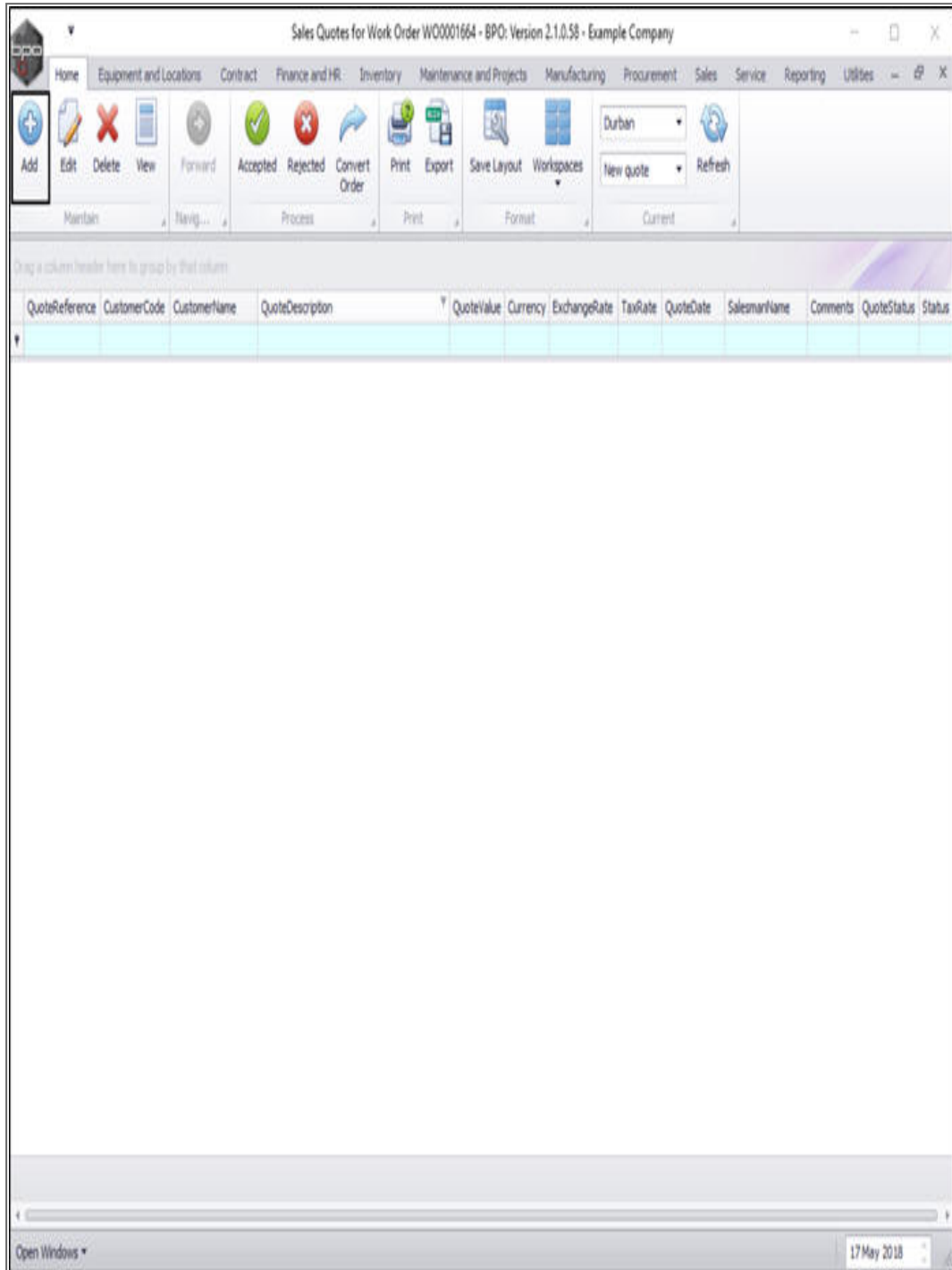
The **Maintain WO - Ref [ ]** screen will be displayed.

- Click on the **Quotes** tile.

The *Sales Quotes for Work Order [ ]* listing screen will be displayed.

If there were already sales quotes linked to this work order, they would be listed here.

- Click on **Add**.



Sales Quotes for Work Order WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Add Edit Delete View Forward Accepted Rejected Convert Order Print Export Save Layout Workspaces

Durban New quote Refresh

QuoteReference CustomerCode CustomerName QuoteDescription QuoteValue Currency ExchangeRate TaxRate QuoteDate SalesmanName Comments QuoteStatus Status

Open Windows 17 May 2018

The **Add new Customer Quote** screen will be displayed.

## QUOTE HEADER DETAILS

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- **Customer Name:** This will auto populate with the name of the customer linked to this work order.
- **Contact Name:** Click on the search button and select a contact from the **Select a contact for this quote** pop up screen.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required.
- **Salesman:** This will auto populate with the person currently logged on to the system but you can click on the search button and select an alternative salesman if required.
- **Reference:** Type in a reference for the quote.
- **Status:** This will auto populate as **New quote**.
- **Date and Time:** These will auto populate with the current date and time.
  - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
  - **Time:** You can either type in or use the arrow indicators to select an alternative time if required.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

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

Maintain Format Print

Customer Name	Hope Works	Reference	
Contact Name		Status	New quote
Commercial	Default	Date & Time	21 May 2018 13:21:14
Salesman	Abigail Mine		
Currency	South African Rand	Exchange Rate	1
Tax Rate	15.00		

RefType	ReferenceType	ReferenceNo
ASPN	Serial No	2020-103053
CALL	Call Reference	
CASE	Case	
CTR	Contract No	C00000043
PHLC	Location	
PMNG	Project Reference	

SuppressOnPrint	QuoteItemT...	ItemCode	QuoteItemDescription	WarehouseName	Quan...	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
	Select type...													

Comment

Sub Total 0.00

VAT 0.00

Grand Total 0.00

Open Windows 21 May 2018



## QUOTE FINANCIAL DETAILS

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- **Currency:** This will populate with the currency set up on the customer. Use the drop-down arrow to display the currency menu and select an alternative currency if required.
- **Tax Rate:** This will populate with the tax rate set up on the customer. Click on the search button and select a new rate if required.
- **Exchange Rate:** This will populate based on the currency set up in the system. Type in or use the directional arrows to select a new exchange rate if required.

Help v2.5.1.4 - Pg 10 - Printed: 27/06/2024

## CROSS REFERENCE INFORMATION

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- In the **References** frame you can see that this quote is linked to a **Serial Number** and a **Contract Number**.
- **Scroll down** in this References frame.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

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

Maintain Format Print

Customer Name: Hope Works Reference: HW Q-0123  
 Contact Name: Julia Ritson Status: New quote  
 Commercial: Default Date & Time: 21 May 2018 13:21:14  
 Salesman: Abigail Mine  
 Currency: South African Rand Exchange Rate: 1  
 Tax Rate: 15.00

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	2020-103053
CALL	Call Reference	
CASE	Case	
CTRT	Contract No	CO0000043
PNLC	Location	
PMNG	Project Reference	

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
	Select type...													

Comment

Sub Total 0.00  
 VAT 0.00  
 Grand Total 0.00

Open Windows 21 May 2018

- You can now view the linked work order number that you initially selected when you began this '*raise a quote*' process.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

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

Maintain Format Print

Customer Name: Hope Works  Reference: HW Q-0123

Contact Name: Julia Ritson  Status: New quote

Commercial: Default  Date & Time: 21 May 2018 13:21:14

Salesman: Abigail Mine

Currency: South African Rand  Exchange Rate: 1

Tax Rate: 15.00

RefType	ReferenceType	ReferenceNo
CASE	Case	
CTRT	Contract No	CO0000043
PNLC	Location	
PMNG	Project Reference	
WKOR	Work Order Reference	WO0001664

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
<input type="checkbox"/>	Select type...													

Comment

Sub Total 0.00

VAT 0.00

Grand Total 0.00

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## ADD QUOTE ITEM DETAILS

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- Follow the process in [Add New Customer Quote](#) to add the quote item details as required.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

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

Maintain Format Print

Customer Name: Hope Works Reference: HW Q-0123 RefType: CASE ReferenceType: Case ReferenceNo: C00000043

Contact Name: Julia Ritson Status: New quote CTRT: Contract No: C00000043

Commercial: Default Date & Time: 21 May 2018 13:21:14 PNLC: Location

Salesman: Abigail Mine PMRG: Project Reference

Currency: South African Rand Exchange Rate: 1 WKOR: Work Order Reference: W00001664

Tax Rate: 15.00

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
<input type="checkbox"/>	Parts	19-687	Drum	Main Warehouse	1.00	0.00		1,000.00	0.00	0.00	1,200.00	1,200.00	15.00	A
<input type="checkbox"/>	Select type...													

Comment:

Sub Total: 1,200.00

VAT: 180.00

Grand Total: 1,380.00

Open Windows 21 May 2018

## COMMENTS

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- Click in this text box and type in a ***comment*** for this quote. This comment will appear on the ***quote document***.



Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

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

Maintain Format Print

Customer Name: Hope Works Reference: HW Q-0123 RefType: CASE ReferenceType: Case ReferenceNo: C00000043

Contact Name: Julia Ritson Status: New quote CTRT: Contract No: C00000043

Commercial: Default Date & Time: 21 May 2018 13:21:14 PNL: Location: PNLG: Project Reference: WKOR: Work Order Reference: W00001664

Salesman: Abigail Mine Currency: South African Rand Exchange Rate: 1 Tax Rate: 15.00

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
<input type="checkbox"/>	Parts	19-687	Drum	Main Warehouse	1.00	0.00		1,000.00	0.00	0.00	1,200.00	1,200.00	15.00	A
<input type="checkbox"/>	Select type...													

Comment

Sub Total: 1,200.00

VAT: 180.00

Grand Total: 1,380.00

Open Windows 21 May 2018

## SAVE QUOTE

- When you have finished adding the quote details, click on **Save**.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

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

Maintain Format Print

Customer Name: Hope Works Reference: HW Q-0123  
 Contact Name: Julia Ritson Status: New quote  
 Commercial: Default Date & Time: 21 May 2018 13:21:14  
 Salesman: Abigail Mine  
 Currency: South African Rand Exchange Rate: 1  
 Tax Rate: 15.00

RefType	ReferenceType	ReferenceNo
CASE	Case	
CTRT	Contract No	CO0000043
PNLC	Location	
PMNG	Project Reference	
WKOR	Work Order Reference	WO0001664

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
	Parts	19-687	Drum	Main Warehouse	1.00	0.00		1,000.00	0.00	0.00	1,200.00	1,200.00	15.00	A
	Select type...													

Comment: New drum required.

Sub Total: 1,200.00  
 VAT: 180.00  
 Grand Total: 1,380.00

Open Windows 21 May 2018

- The new customer quote information will be **saved** and you will return to the **Sales Quotes for Work Order [ ]** listing screen.
- Here you can now view the newly created sales quote details.

Sales Quotes for Work Order W00001664 - BPO: Version 2.1.0.58 - Example Company

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

Add Edit Delete View Forward Accepted Rejected Convert Order Print Export Save Layout Workspaces

Durban New quote Refresh

Maintain Navig... Process Print Format Current

Drag a column header here to group by that column

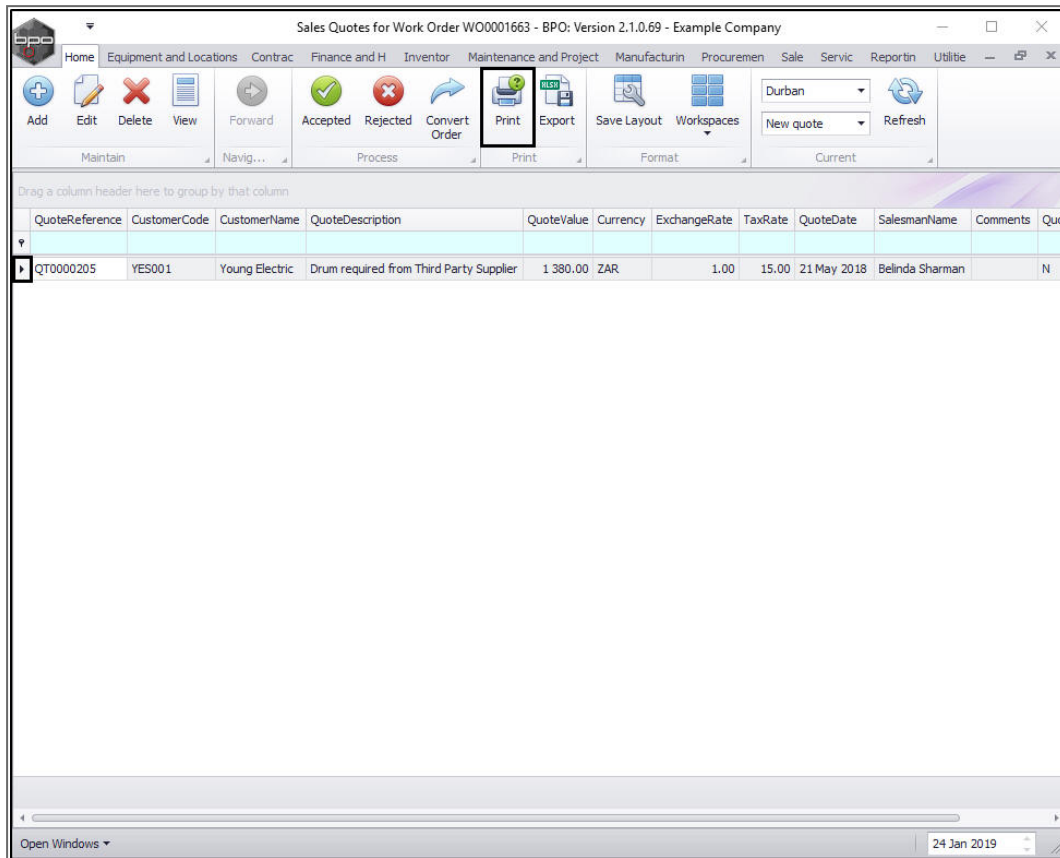
QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000206	HOP001	Hope Works	HW Q-0123	1 380.00	ZAR	1.00	15.00	21 May 2018	Abigal Mine	New drum required.	N	A

Open Windows 21 May 2018

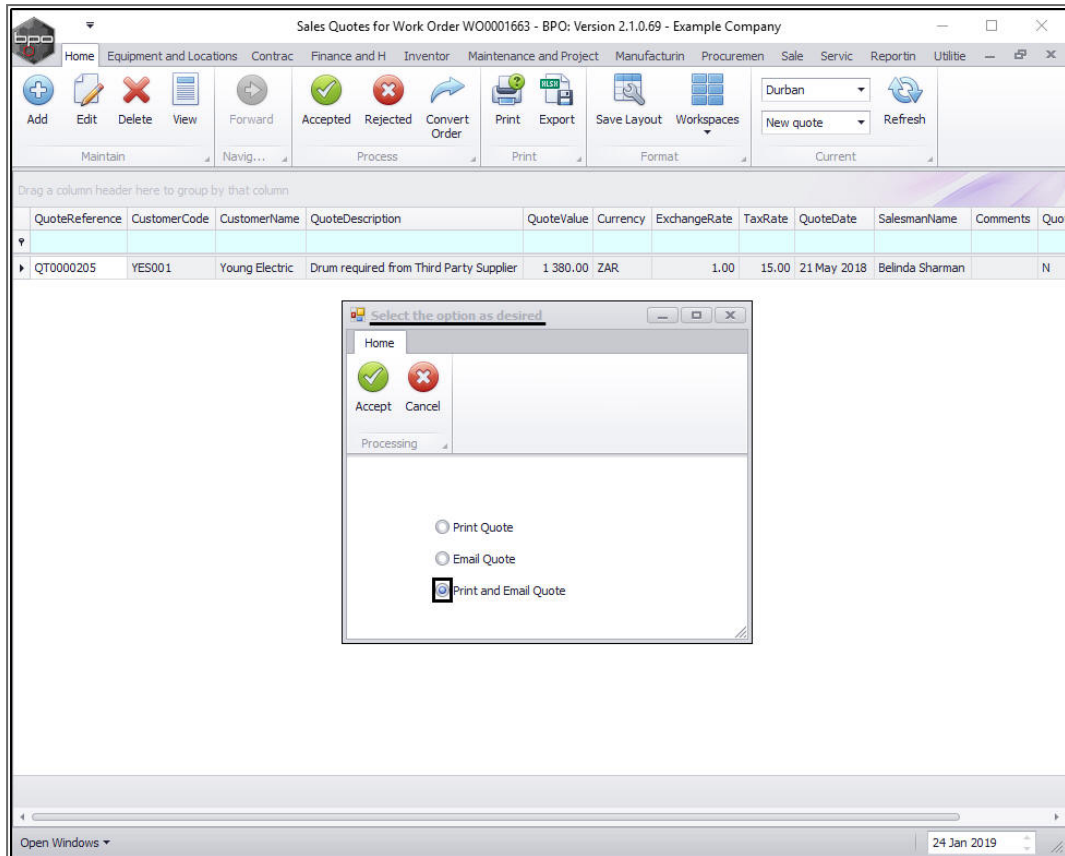
## PRINT, EMAIL QUOTE

In the Sales Quotes for Work Order [ ] listing screen,

- Click on the **row selector** in front of the **quote**.
- Click on **Print**.

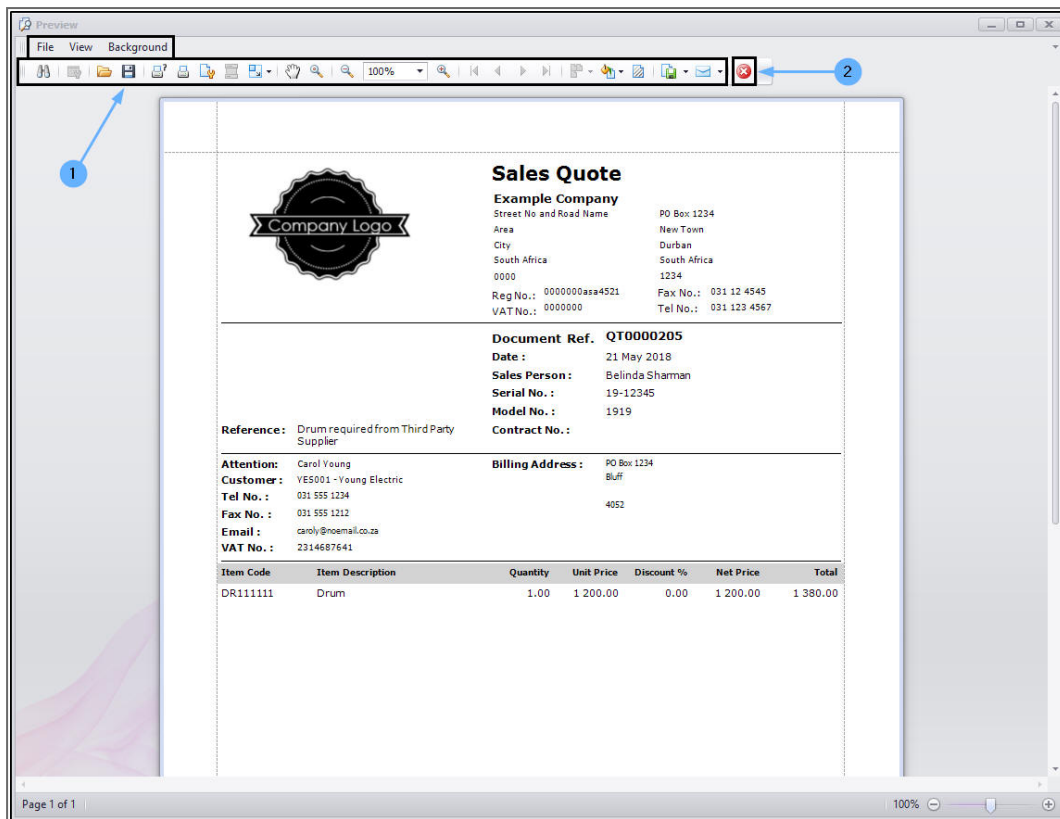


- A **Select the option as desired** pop up menu will appear with **Print** and **Email** choices.
- Click on the **radio button** in front of your selected option.
  - In this example, **Print and Email Quote** has been selected.
- Click on **Accept**.



The **Report Preview** screen will be displayed.

1. From here you can **View**, **Print**, **Export** or **Email** the Sales Quote.
2. **Close** this screen when you are done.

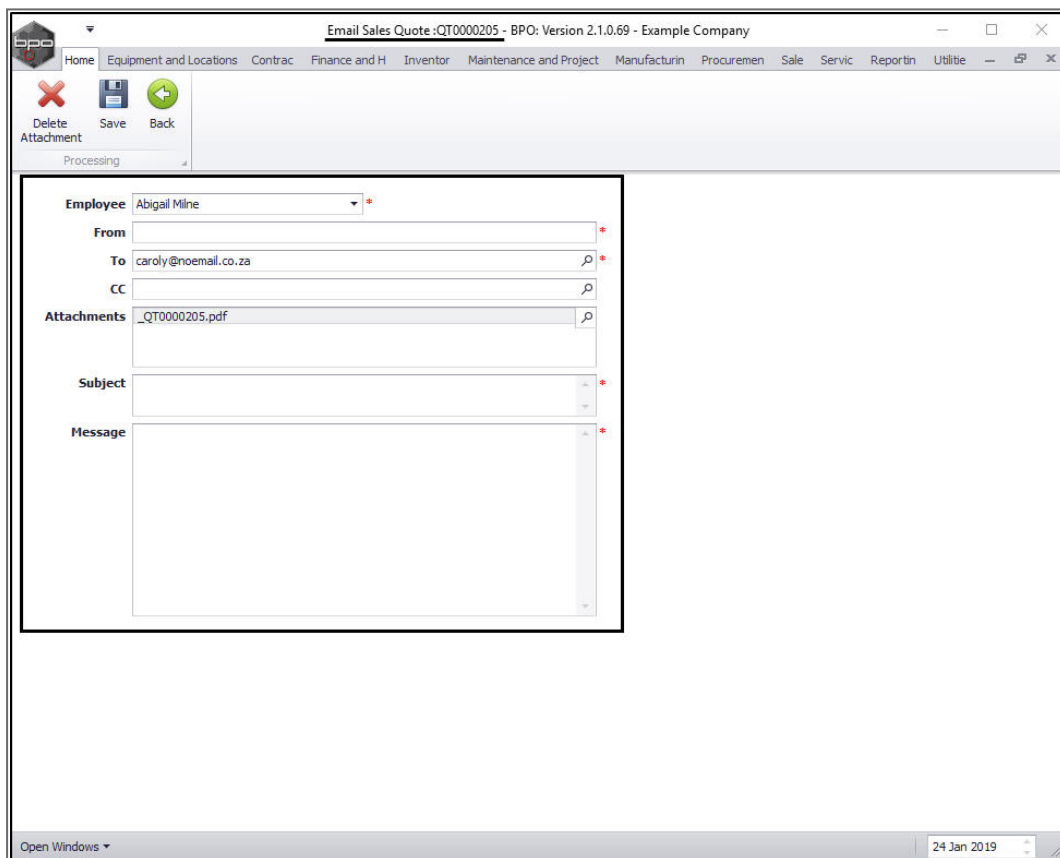


As the Report Preview screen is closed the **Email Sales Quote: [ ]** screen will be displayed.

- **Employee:** This will populate with the employee who is currently logged on to the system. You can click on the drop-down arrow and select an alternative employee, if required.
- **From:** Type in the email address of the employee above.
- **To:** This will populate with the email address of the Customer Contact selected on the Quote (the accounts person will be always added to this). You can also type in an additional email address (separated by a semi-colon), or click on the search button and select

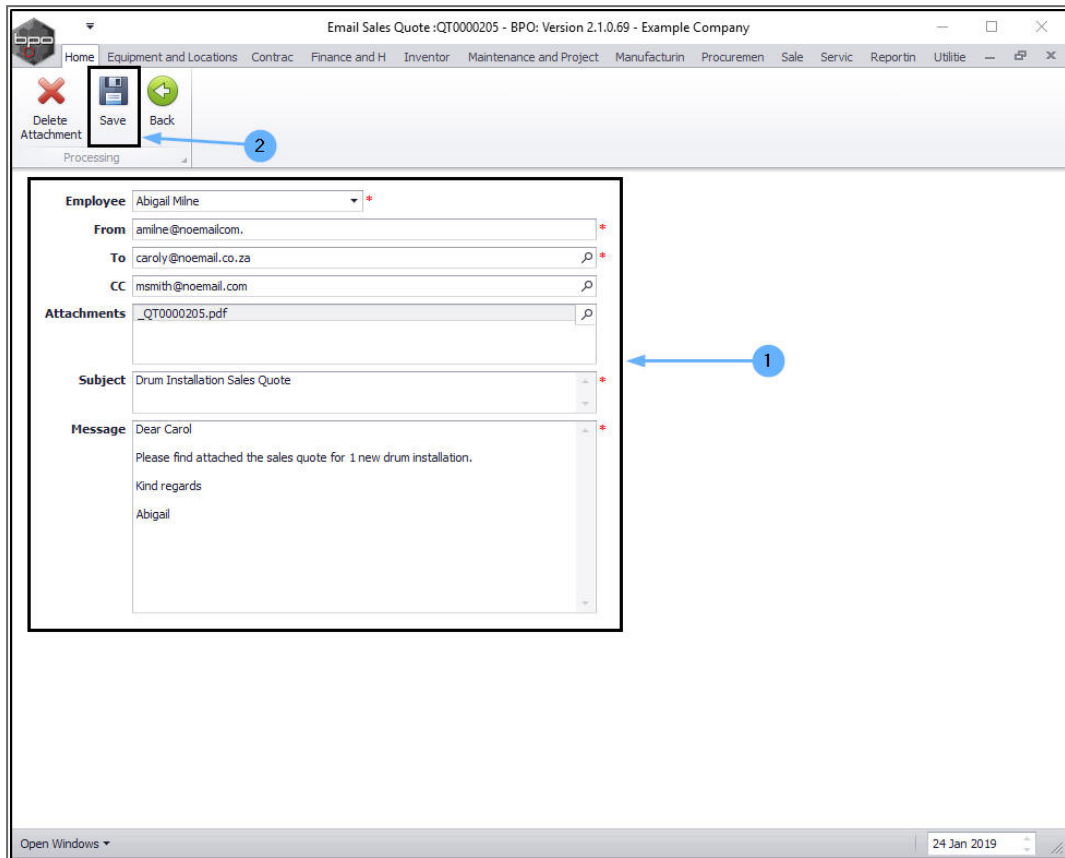
from the pop up screen, an additional customer contact(s).

- **CC:** If a group email address has been set up on the quote or accounts contact, that will pull through here. You can also type in an additional email address (separated by a semi-colon), or click on the search button and select from the pop up screen, an additional customer contact(s).
- **Attachments:** BPO will create a PDF of the quote and attach it automatically. (You can also attach additional documentation by clicking on the search button and browsing for the file you wish to attach.)
- **Subject:** Type in the email subject.
- **Message:** Type in a message regarding the email.



The screenshot shows a web-based application window titled "Email Sales Quote :QT0000205 - BPO: Version 2.1.0.69 - Example Company". The interface includes a top menu bar with various functional tabs: Home, Equipment and Locations, Contract, Finance and H, Inventor, Maintenance and Project, Manufacturin, Procuremen, Sale, Servic, Reportin, and Utilitie. Below the menu bar, there are three primary action buttons: "Delete Attachment" (with a red X icon), "Save" (with a floppy disk icon), and "Back" (with a green arrow icon). The main content area is a form for composing an email. It contains several labeled fields: "Employee" (a dropdown menu currently showing "Abigail Milne"), "From" (a text input field), "To" (a text input field containing "caroly@noemail.co.za"), "CC" (a text input field), "Attachments" (a list box showing "\_QT0000205.pdf"), "Subject" (a text input field), and "Message" (a large text area). Each of these fields has a small red asterisk to its right, indicating they are required. At the bottom left of the window, there is a status bar that says "Processing". At the bottom right, a date and time stamp reads "24 Jan 2019".

1. When you have added all the required details to this screen,
2. click on **Save**.



- The email will be sent from the **server** and you will return to the **Sales Quotes for Work Order [ ]** listing screen.



Sales Quotes for Work Order WO0001663 - BPO: Version 2.1.0.69 - Example Company

Home Equipment and Locations Contract Finance and H Inventor Maintenance and Project Manufacturin Procuremen Sale Servic Reportin Utilite

Add Edit Delete View Forward Accepted Rejected Convert Order Print Export Save Layout Workspaces Durban New quote Refresh

Maintain Navig... Process Print Format Current

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	Quo
X QT0000205	YES001	Young Electric	Drum required from Third Party Supplier	1 380.00	ZAR	1.00	15.00	21 May 2018	Belinda Sharman		N

Open Windows 24 Jan 2019

## Related Topics

Once the client has approved the quote, it can be processed further:

[Convert to Sales Order](#)

[Add Items to WO](#)

MNU.073.014

