

SERVICE

CALLS - SALES QUOTES

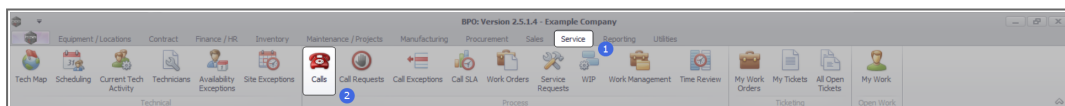
Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

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.

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

- [Convert to Sales Order](#)
- [Add Items to WO](#)

Ribbon Select *Service* > *Calls*



- The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	00:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Salemshire Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
IB CH0000992	Top Velocity Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C00000594	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT300000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	13/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	00:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Salemshire Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
IB CH0000992	Top Velocity Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C00000594	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT300000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	13/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
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IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- Select the **Call** you wish to work with.

Call Listing - BPO Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilborn	09:09:10	Test account balance	CR	Change Request			an123		1
BI CH0001002	Semantic Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balance manual	SR	Select Call Type			BP-12/12/22		3
BI CH0001001	Young Electric	26/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BI CH0000998	Top Value Hires	25/10/2022	Unassigned		14:08:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
BI CH0000991	Apple Juice Inc	24/09/2022	Unassigned		09:36:15	Contact Closure - C00000059	SR	Select Call Type					2
BI CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	01/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/06/2022	Unassigned		09:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/06/2022	Unassigned		09:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		05:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN02413546		3
BI CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:26	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095013015		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095013015		3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
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BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	21/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
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BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000955	Hope Works (Pty) Ltd	16/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

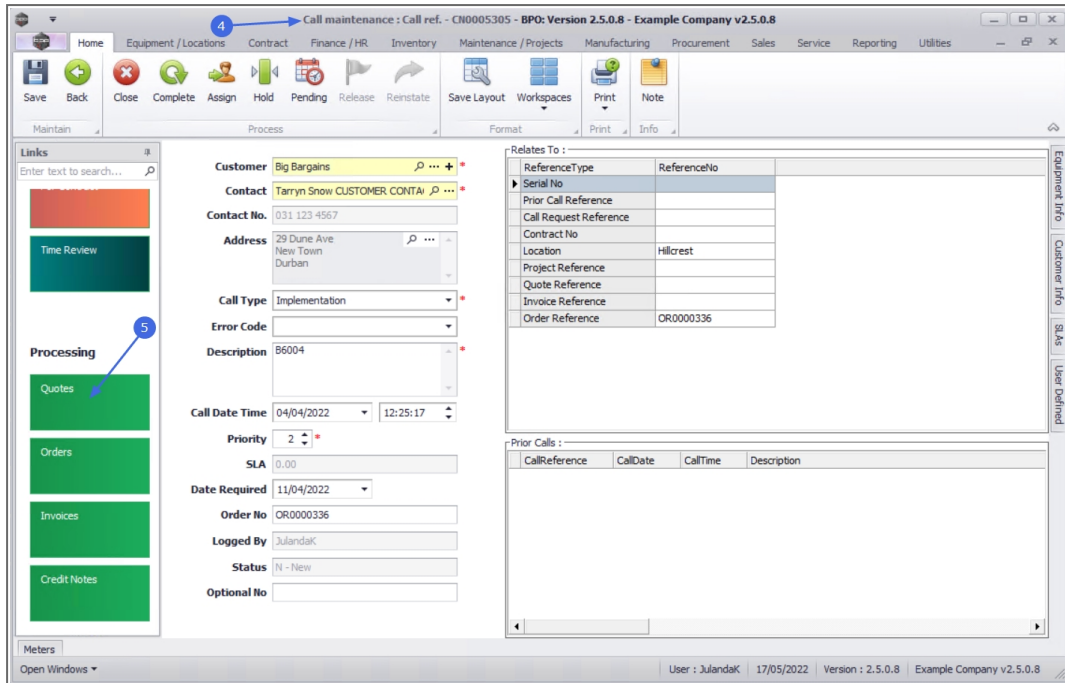
- Click on the **Edit** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

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BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
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BI CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
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BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
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BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

- The **Call maintenance : Call ref. - [call ref number]** screen will be displayed.
- Click on the **Quotes** tile.



QUOTE LISTING

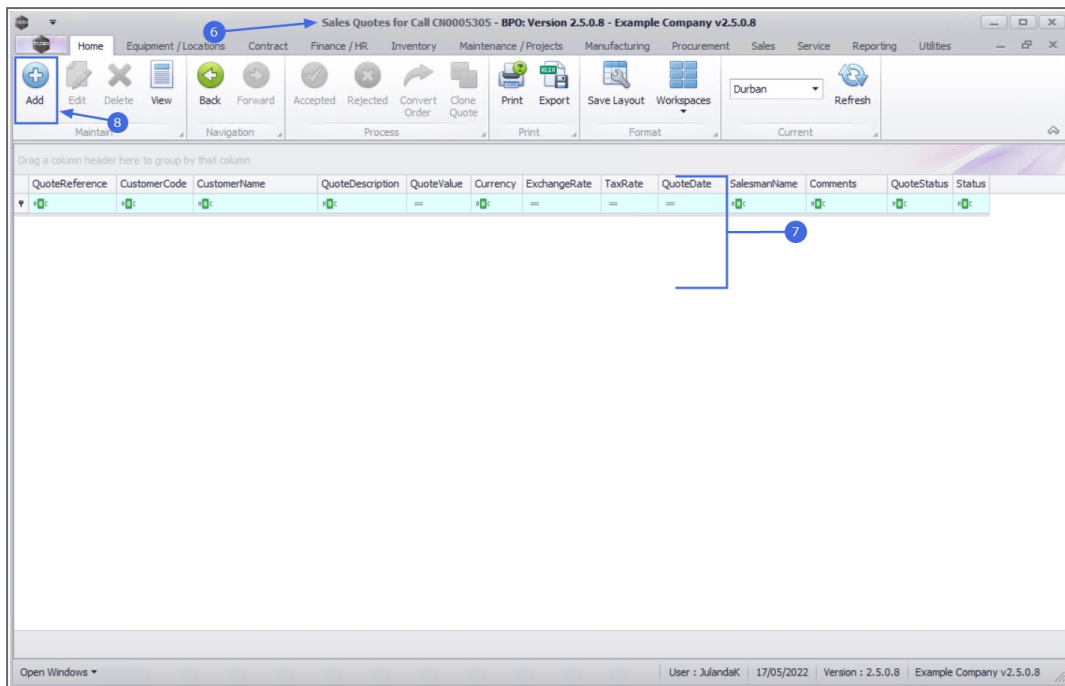
- The **Sales Quotes for Call** [call ref number] screen will be displayed.
- Any quotes that have already been created for the call, will be listed on this screen.

ADD SALES QUOTE

- Click on **Add**.



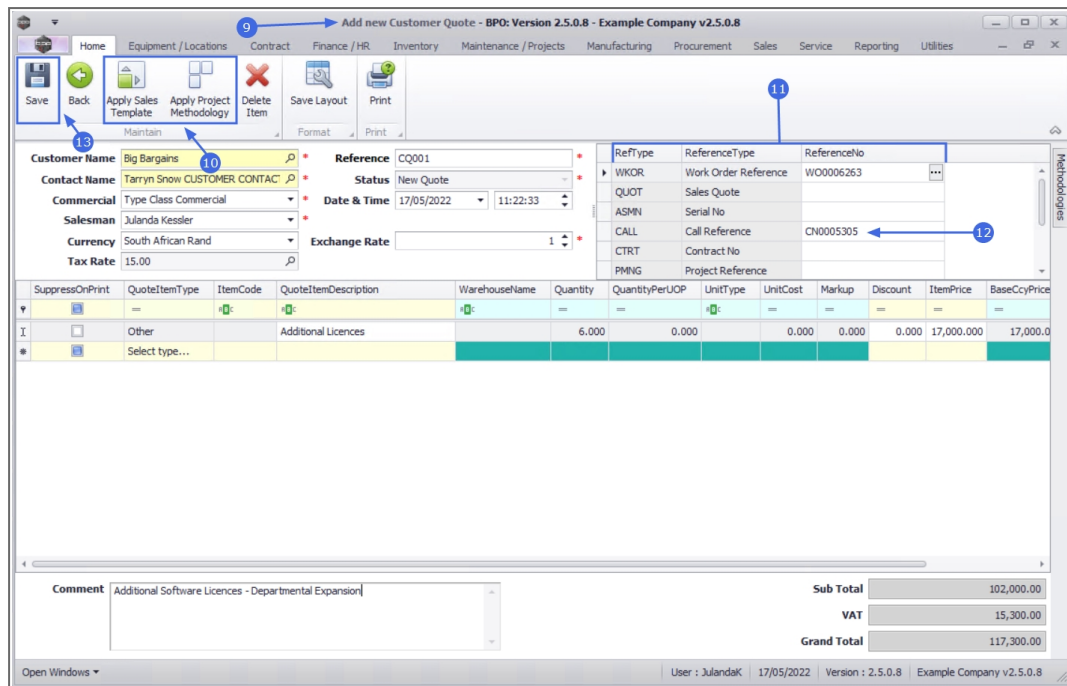
Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



- The Add new Customer Quote screen will display.
- You have the option to [Apply Sales Template](#) or [Apply Project Methodology](#) to the sales quote.

CROSS REFERENCE

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



You will return to the *Sales Quotes for Call* screen.

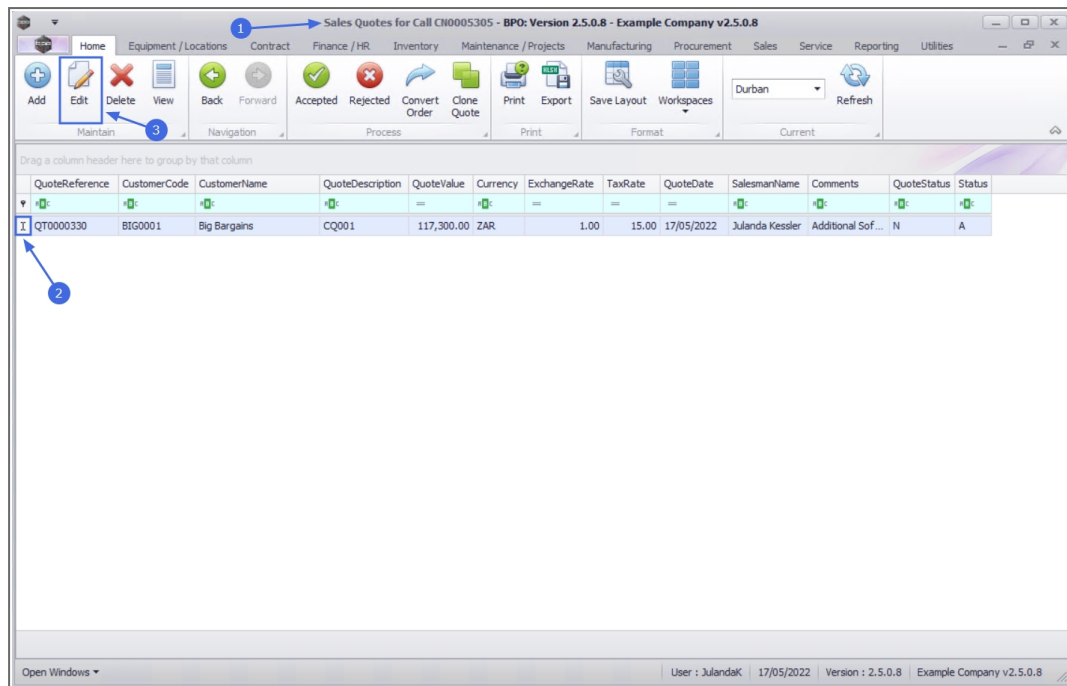
EDIT QUOTE

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

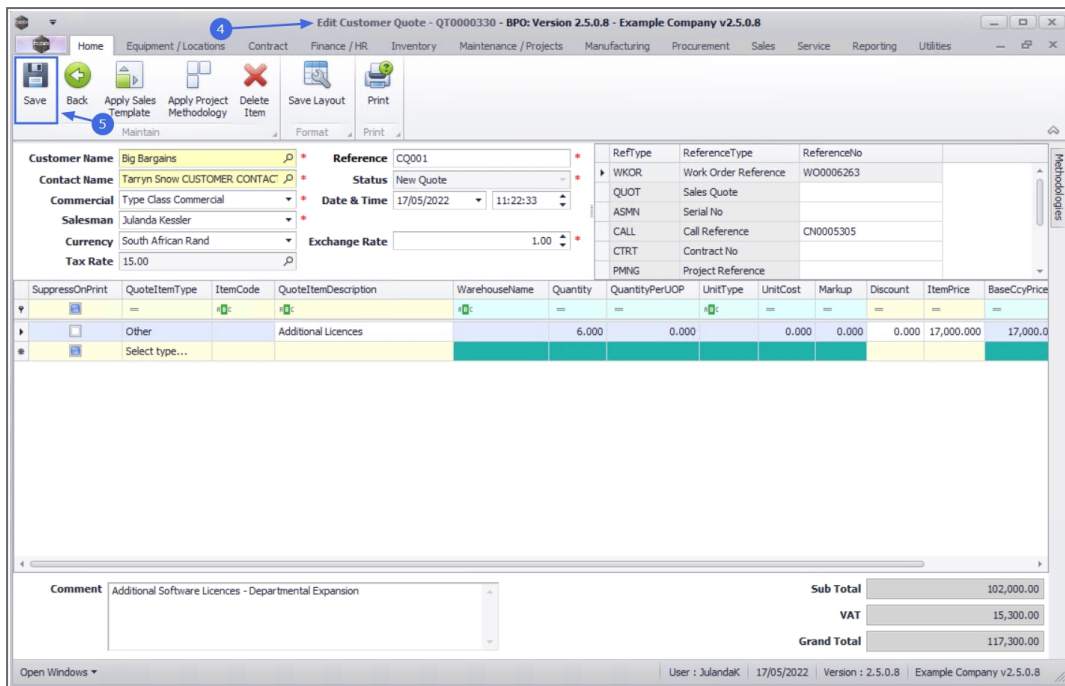
- From the *Sales Quotes for Call [call ref number]* screen,
- Click on the **row** of the Quote you wish to make changes to.
- Click on **Edit**.



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



- "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 Call** listing screen.



DELETE QUOTE

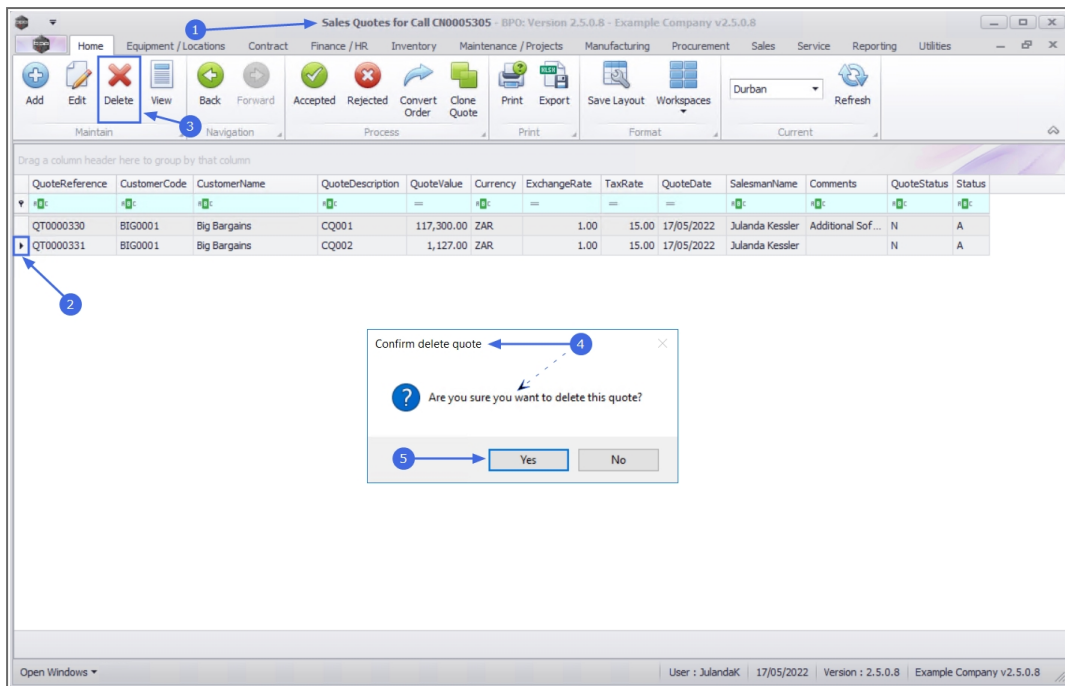
Only Quotes with a *N - New Quote* in the *Quote Status* column can be deleted.

- From the **Sales Quotes for Call** [call ref number] screen,
- Click on the **row** of the Sales Quote you wish to **remove**.
- Click on **Delete**.



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

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

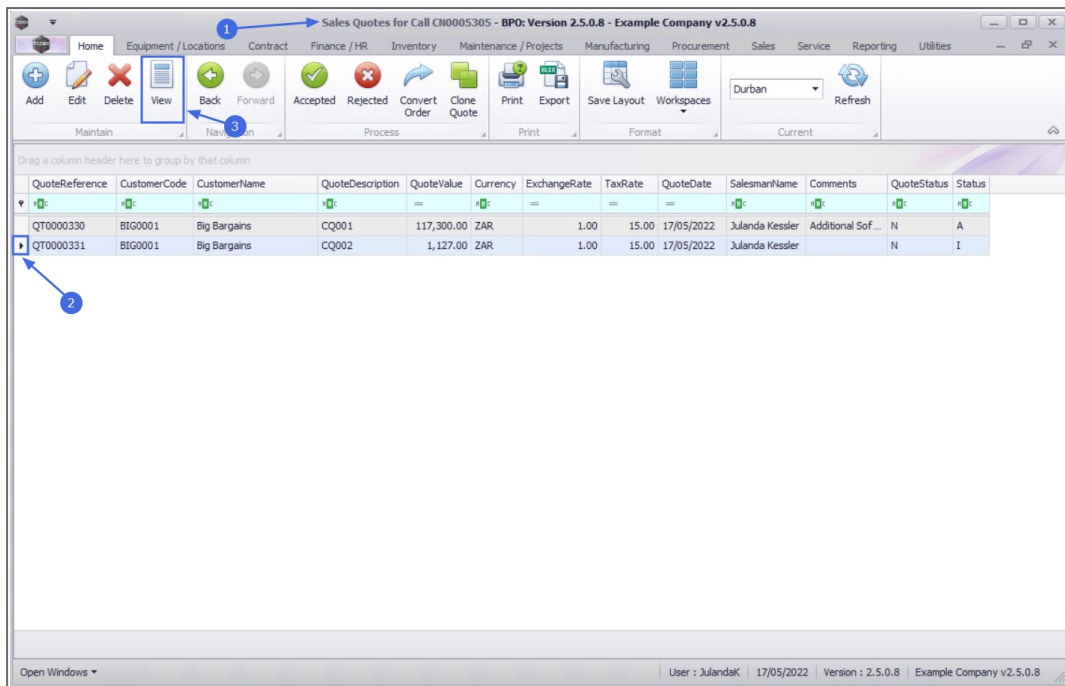


The **Status** for the Sales Quote on the **Sales Quotes for Work Order** screen has changed from **A-Active** to **I-Inactive**.

VIEW QUOTE

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

- From the **Sales Quotes for Call [call ref number]** screen,
- Click on the **row** of the Sales Quote you wish to **view**.
- Click on **View**.



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



No changes can be made to the information on the Quote.

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

View Customer Quote - QT0000331 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Back Save Layout Print

Customer Name: Big Bargains
 Contact Name: Tarryn Snow CUSTOMER CONTACT
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Currency: South African Rand
 Tax Rate: 15.00

Reference: CQ002
 Status: New Quote
 Date & Time: 17/05/2022 11:32:12
 Exchange Rate: 1.00

RefType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	
QUOT	Sales Quote	
ASMN	Serial No	
CALL	Call Reference	CN0005305
CTR1	Contract No	
PMNG	Project Reference	

SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice
No	INN	CHA001	Chair	Main Warehouse	1.000	0.000		0.000	0.000	0.000	980.000	980.0

Comment

Sub Total: 980.00
 VAT: 147.00
 Grand Total: 1,127.00

Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

FORWARD NAVIGATION

The *Forward* navigation button is only available in the *Invoiced Quote* status after the Sales Quote has been Converted to Order.

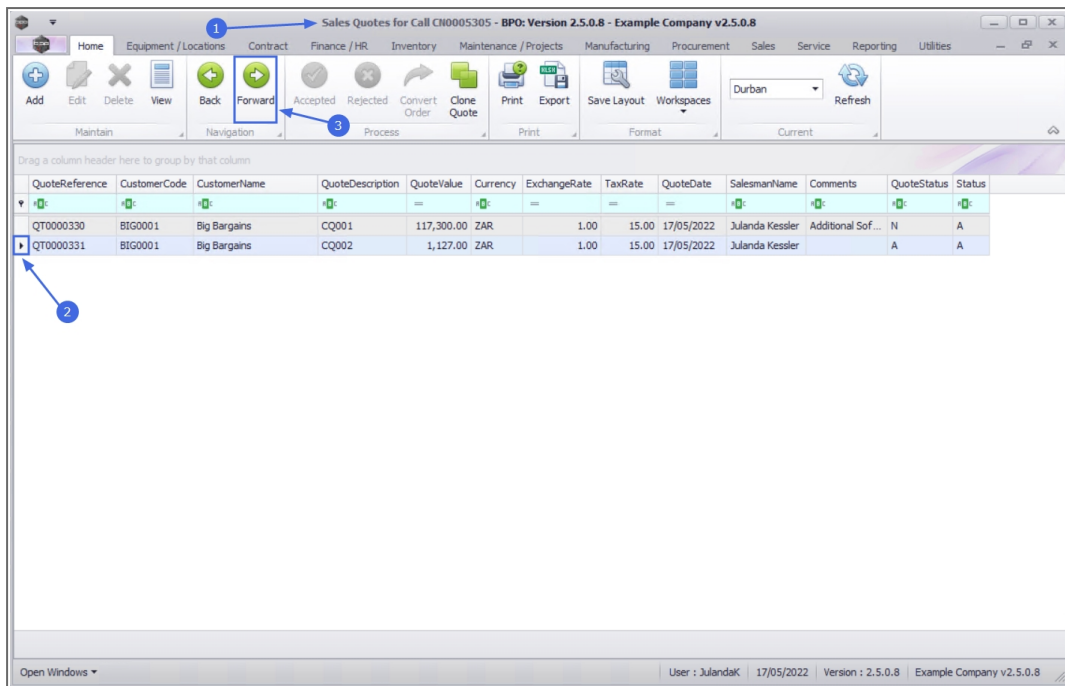
This feature enables the user to quickly navigate to related documentation.

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.

- From the **Sales Quotes for Call** [call ref number] screen,
- Click on the **row** of the Invoiced Quote you wish to view.
- 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**.



BACK NAVIGATION

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

Sales Quotes for Call CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Add Edit Delete View **Back** Forward Accepted Rejected Convert Order Clone Quote Print Export Save Layout Workspaces Durban Refresh

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000330	BTG0001	Big Bargains	CQ001	117,300.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler	Additional Sof...	N	A
QT0000331	BTG0001	Big Bargains	CQ002	1,127.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler		A	A

Open Windows User : JulandaK 17/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8

ACCEPT QUOTE

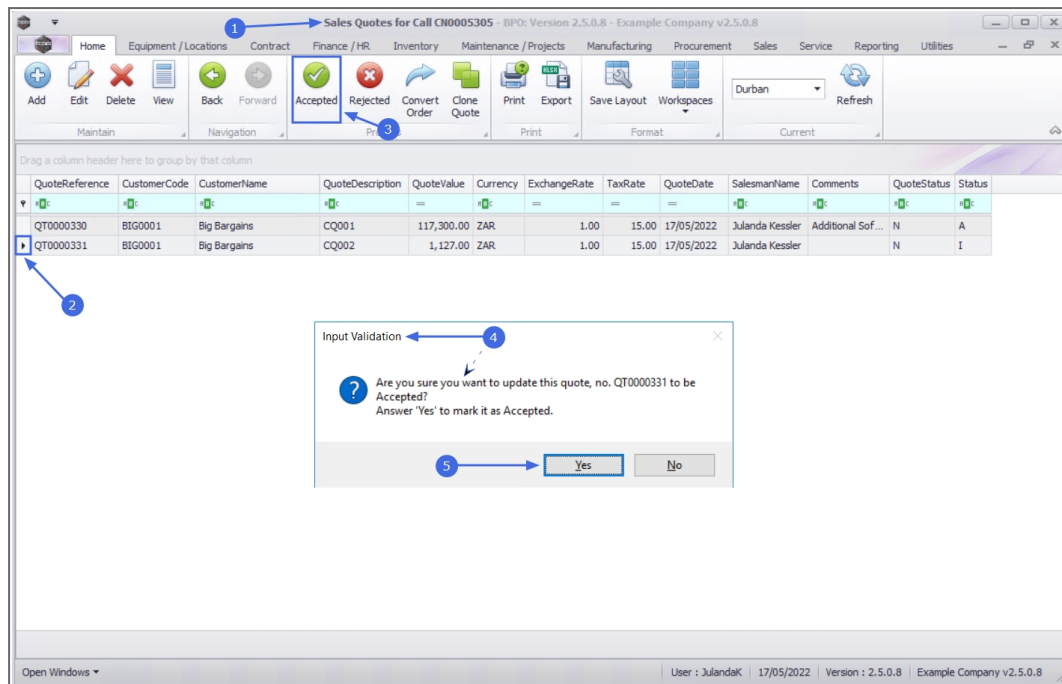
Only quotes with a *N* - *New Quote* in the *Quote Status* can be Accepted.

- From the **Sales Quotes for Call** [call ref number] screen,
- Click on the **row** of the Sales Quote you wish to **accept**.
- Click on **Accepted**.



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

- 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.**
- Click on **Yes**.



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**.

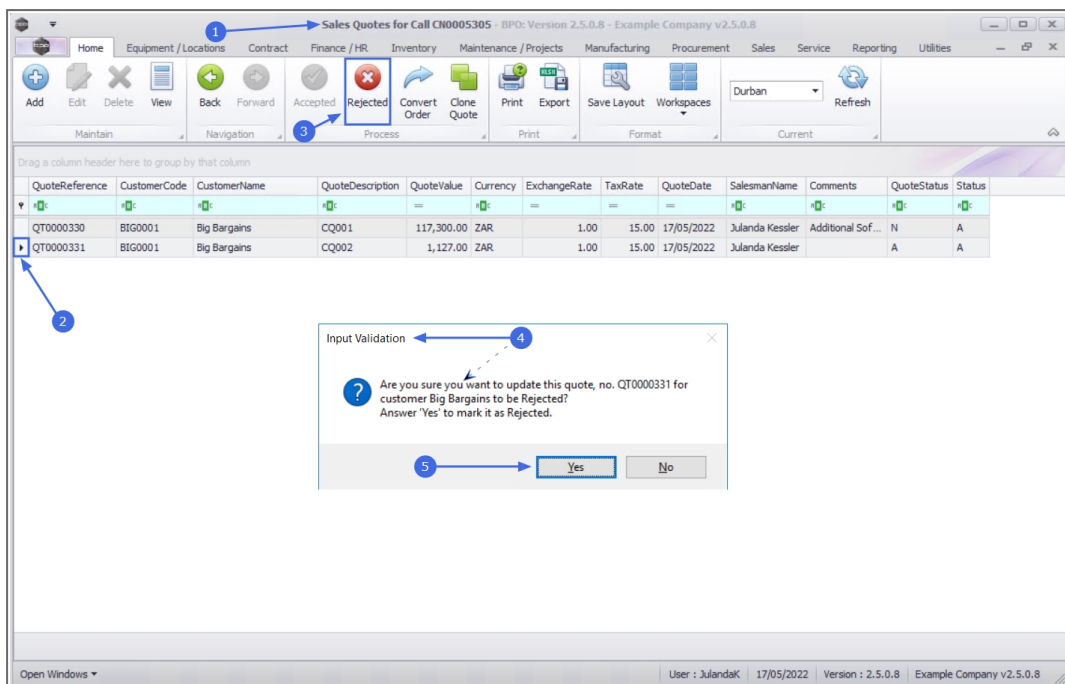
- From the **Sales Quotes for Call [call ref number]** screen,
- Click on the **row** of the Sales Quote that needs to be **rejected**.
- Click on **Rejected**.



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

- 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.**

- Click on **Yes**.



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**.

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

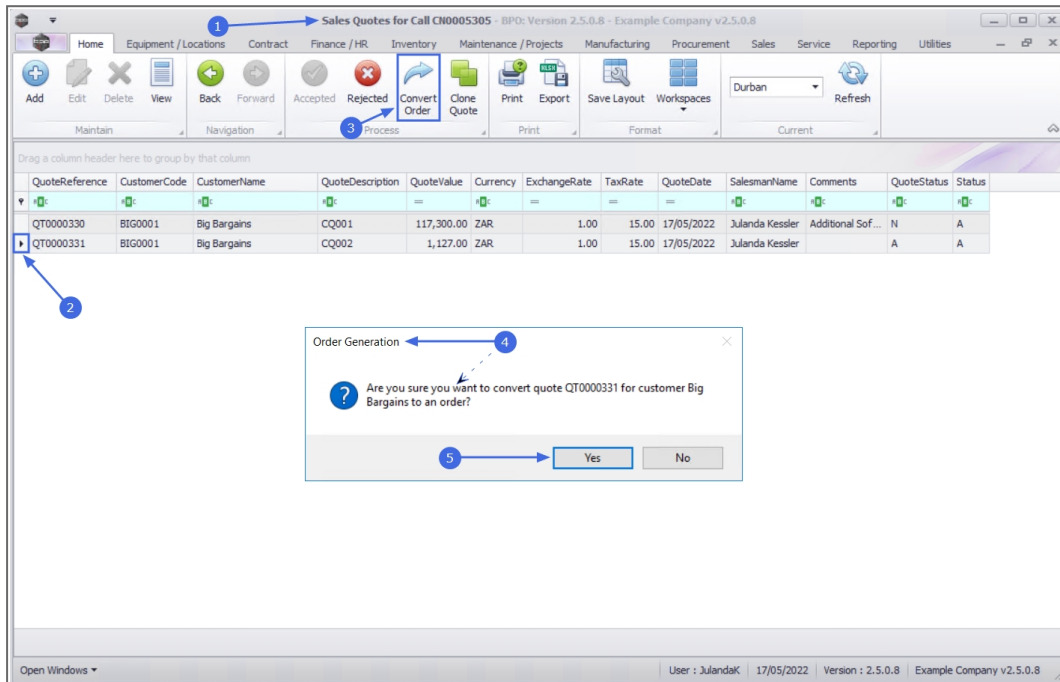


Short cut key: Right click to display the **All groups** menu list. Click on **Order**.

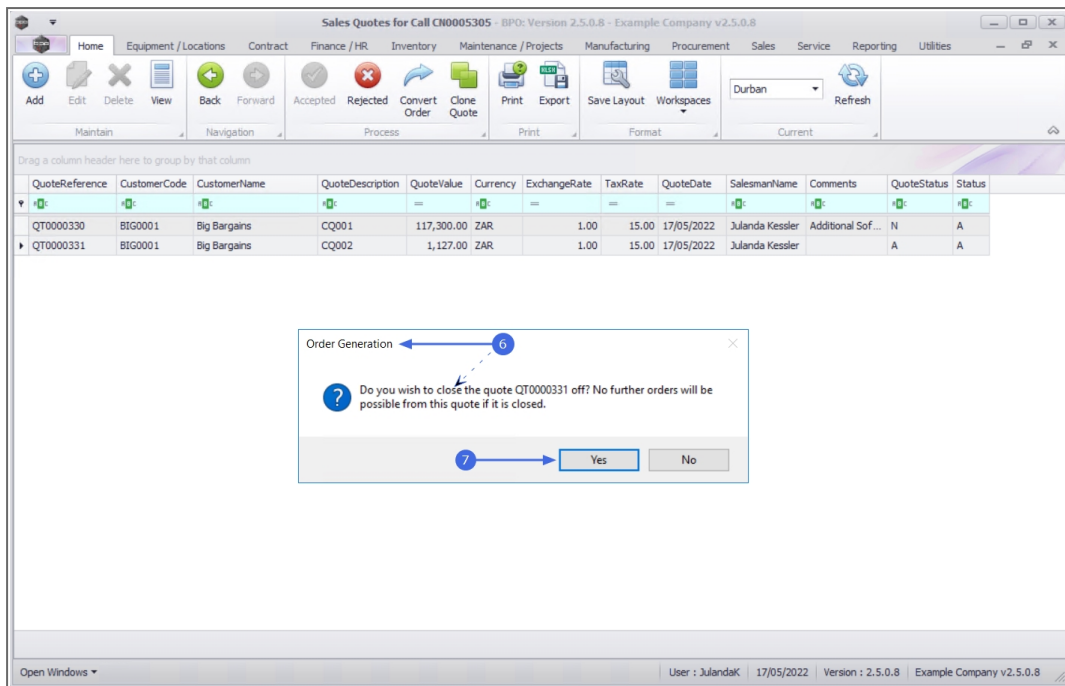


You will receive **three (3)** prompt messages to confirm the transaction:

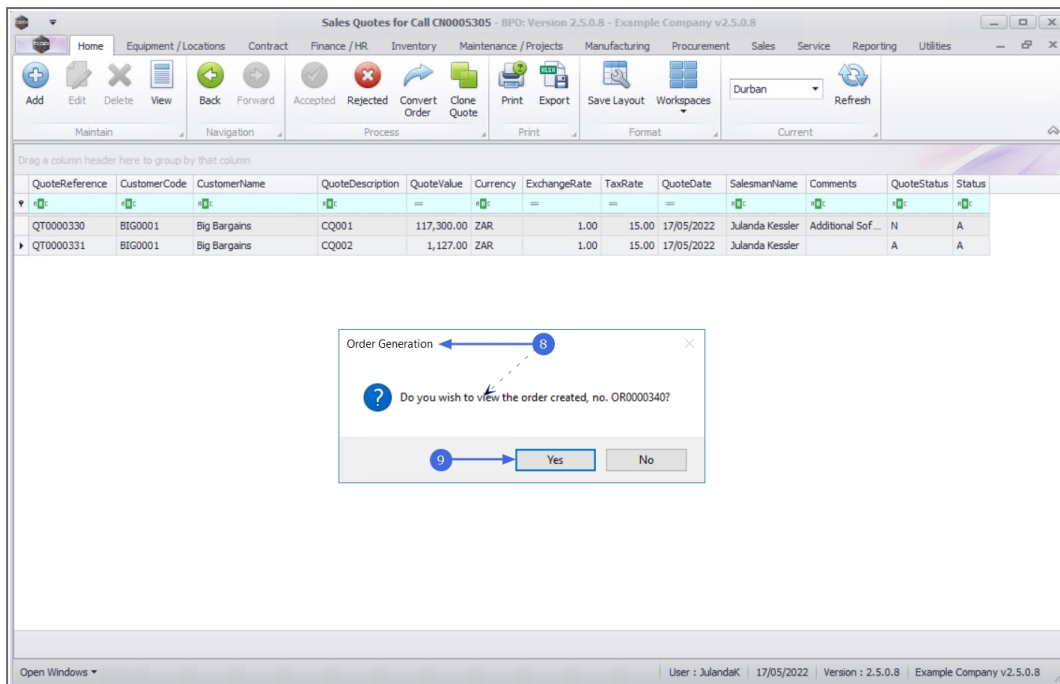
- When you receive the first **Order Generation** message to confirm;
 - **Are you sure you want to convert quote [quote number], for Customer [customer name] to an order?**
- Click on **Yes**.



- 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.
- Click on **Yes**.



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



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](#)

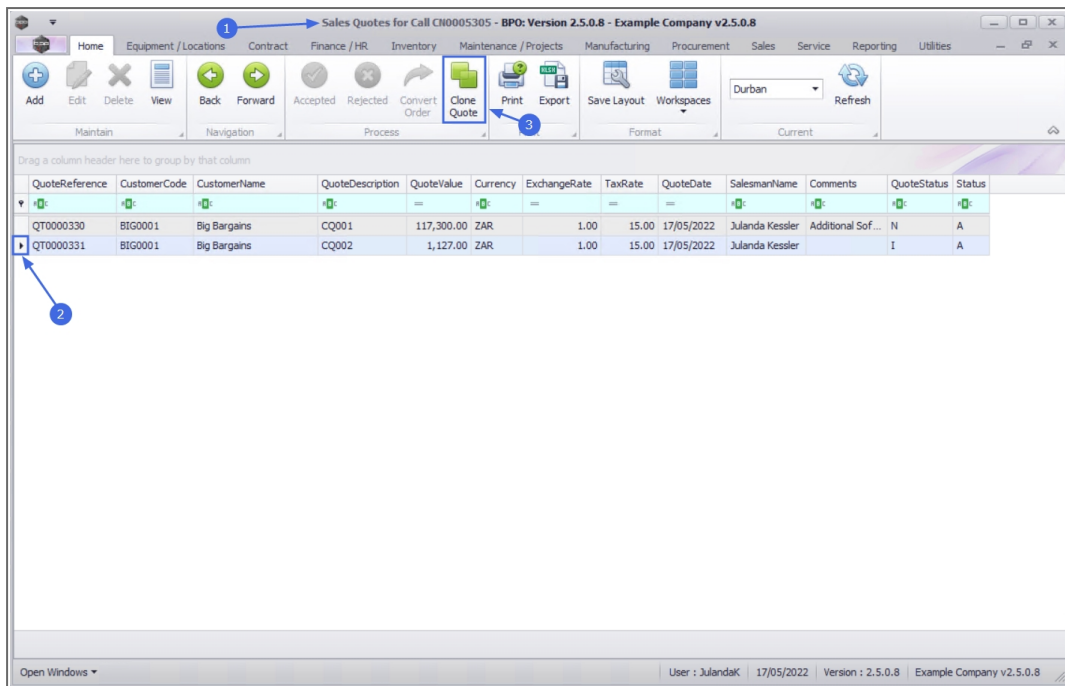
CLONE A QUOTE

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.

- From the **Sales Quotes for Call [call ref number]** screen,
- Select the **row** of the quote you wish to clone.
- Click on **Clone Quote**.



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



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



It is important that a **newReference** is entered as it is used to find and identify the quote once it has been processed.

- You can edit any of the **Customer Heading**, **Financial Heading** or **Cross Reference** details, if required.
- 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](#)

- Click on **Save** when done.

4 Add new Customer Quote - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

7 Maintain

8

Customer Name Big Bargains

Contact Name Tarryn Snow CUSTOMER CONTACT

Commercial Type Class Commercial

Salesman Julanda Kessler

Currency South African Rand

Tax Rate 15.00

Reference CQ002

Status New Quote

Date & Time 17/05/2022 13:26:40

Exchange Rate 1.00

RefType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	
QUOT	Sales Quote	
ASMN	Serial No	
CALL	Call Reference	
CTRT	Contract No	
PMNG	Project Reference	

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice
	Parts	CHA001	Chair	Main Warehouse	1.000	0.000		0.000	0.000	0.000	980.000	980.0
	Select type...											

Comment

Sub Total 980.00

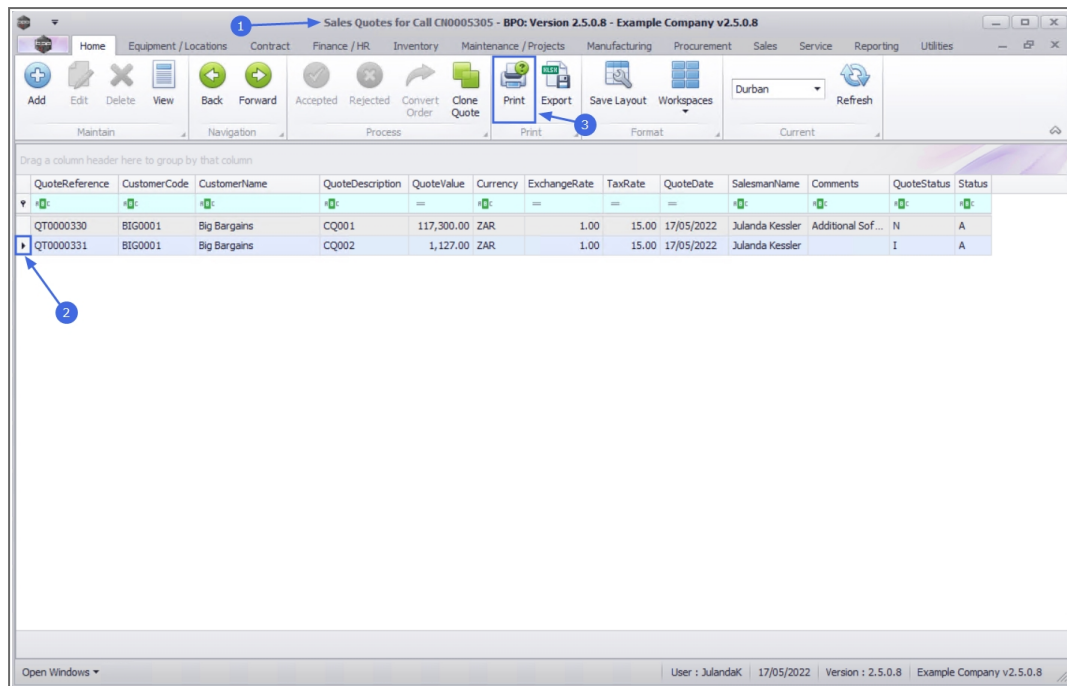
VAT 147.00




Grand Total 1,127.00

Open Windows User : JulandaK 17/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8

PRINT QUOTE

- From the *Sales Quotes for Call [call ref number]* screen,
- Click on the **row**.
- Click on **Print**.

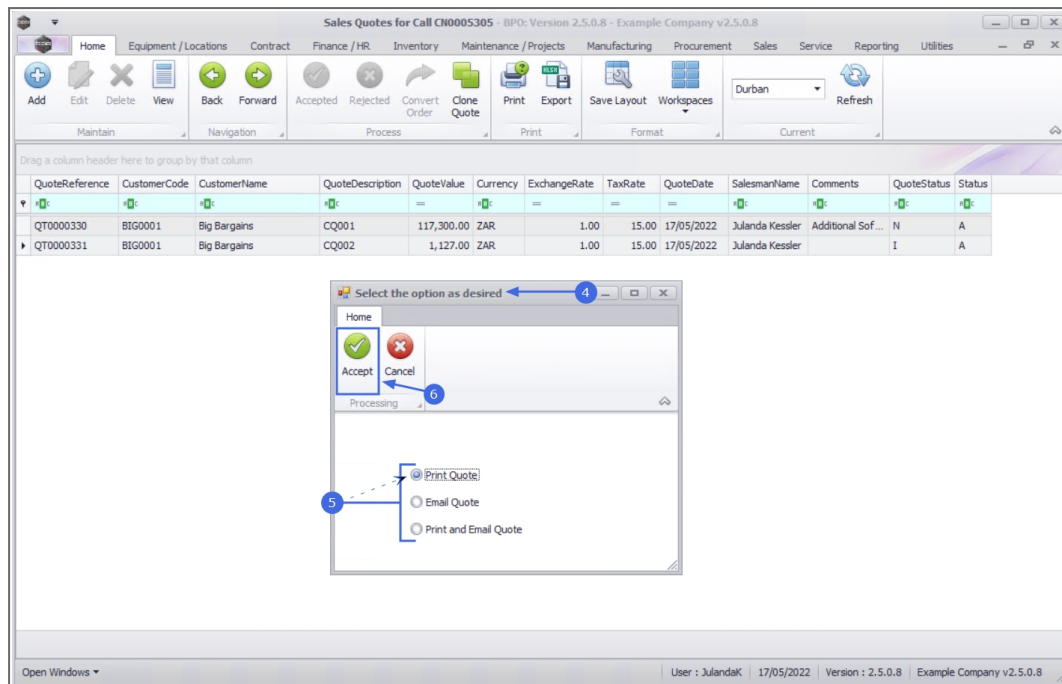


- The **Select the option as desired** message screen will display with the following options;
 -  **Print Quote** will open the Sales Quote in the Pre-view screen to view, print, export or email.
 -  **Email Quote** will allow you to add recipients and the system will create a .PDF of the Sales Quote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

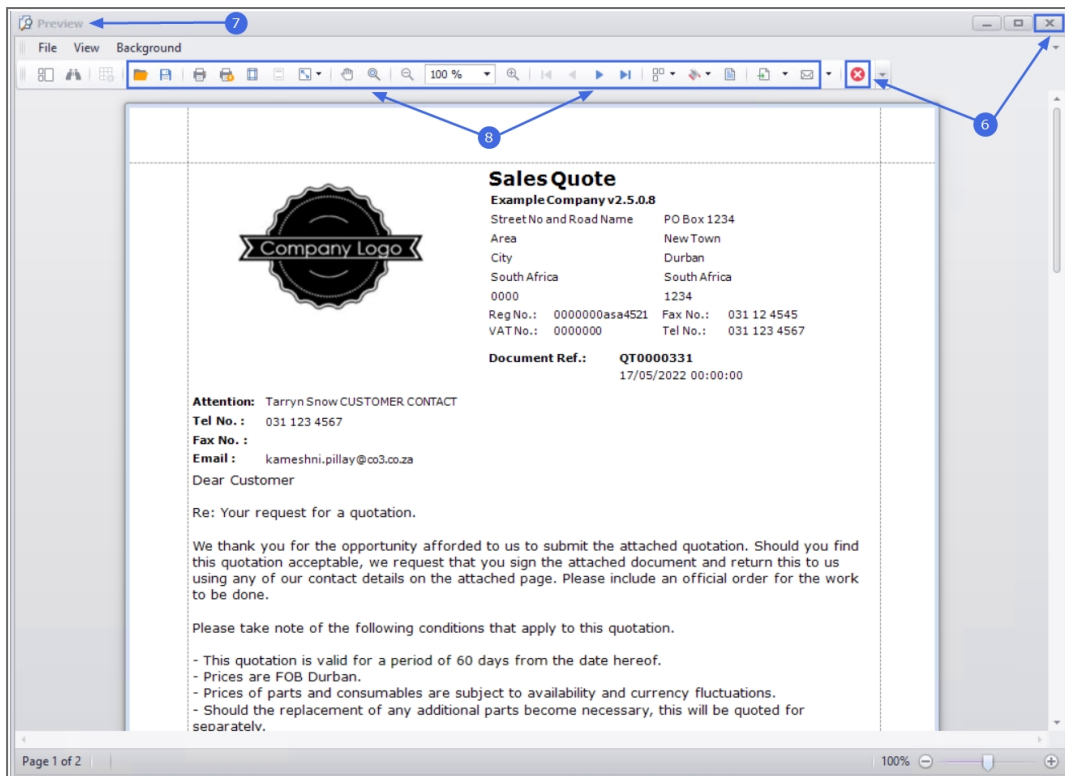


When selecting to **Email the Quote**, the quote will be emailed via the **BPO Email Service** on the server (not from MS Outlook).

- The example has **Print Quote** selected.
- Click on **Accept**.



- 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.
- Click **Close** to return to the **Sales Quotes for Work Order** screen.



MNU.122.010

