

# **SALES STUDIO CONFIGURATION**

## ADD QUOTE DEFAULT ITEMS

Default items are items that are set up to be added to <u>all</u> new quotes.

These are items that a company requires to be quoted *every single time*, and therefore need to be linked automatically, so that the salesman does not need to remember to add them. For example, a company may require a consultation fee and a site inspection fee to be included in every sales quote.

Although these items pull through to each new quote, each item can be individually *removed* from each quote or *edited*, if required.

Follow the process below to *add* quote default items.

#### **Version Compatibility**

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

#### Ribbon Access: Sales Studio > Configuration > Quote Default Items



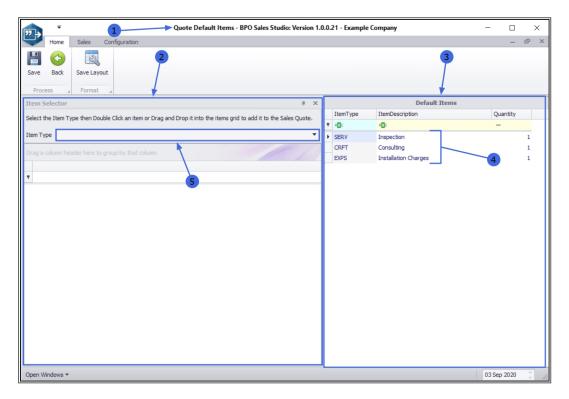


#### THE QUOTE DEFAULT ITEMS SCREEN

- 1. The Quote Default Items screen will open.
- 2. The *Item Selector* frame is on the left of the screen. This is where you are able to choose individual items to be added to the
- 3. **Default Items** frame, on the right of the screen. This frame, contains items that have already been linked and will appear on each new Sales Quote.
- In this example, an *Inspection* fee, a *Consulting* fee and an *Installation Charges* fee have already been set up to link to each new quote.

#### **SELECT THE ITEM TYPE**

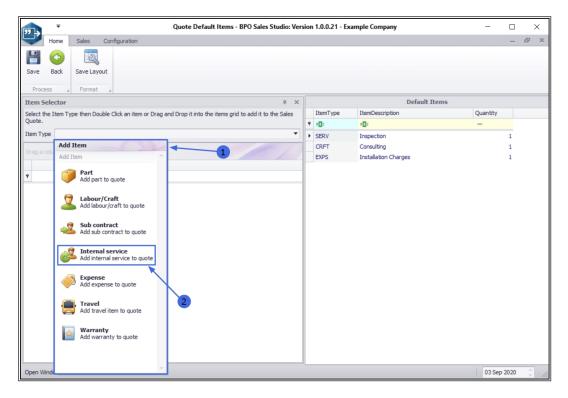
5. In the Item Selector frame, click anywhere in the *Item Type* field.





#### **SELECT ITEM TYPE**

- 1. The *Add Item* menu will pop up.
- 2. Select from the list, the required *Item Type*.
  - ° In this example, *Internal Service* is selected.



#### **SELECT ITEM TO ADD TO THE QUOTE**

- The *Item Selector* frame will populate with a data grid of all the items linked to the selected *Item Type*.
- 2. Select the required item and either,
  - i. *Double click* in the item row or,
  - ii. *Drag* and *drop* the selected item into the *Default Items* frame.
    - ° In this example, *Delivery Fee* is selected.



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#### **ADJUST ITEM QUANTITY**

- You will see the selected item is now added to the data grid in the Default Items frame.
- 2. Click in the *Quantity* column to display directional arrows. You can either,
  - i. *Type in* or
  - ii. Use the directional *arrows* to select an <u>alternative</u> quantity, if required.

#### **SAVE ADDED DEFAULT ITEMS**

3. When you have added all the required items to the Default Items frame, click on *Save*.



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- 1. A *Quote Configuration* message box will pop up informing you;
  - Default items saved successfully.
- 2. Click on *OK*.



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#### **VIEW ADDED DEFAULT ITEM ON A SALES QUOTE**

- 1. Click on the *Sales* ribbon tab.
- 2. The screen will refresh to display the *Quotes* toolbar button, click on this button.

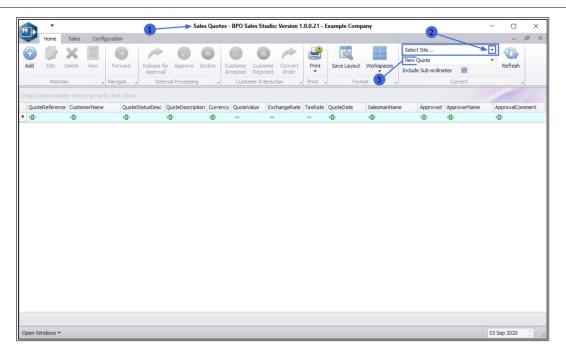


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- 1. The *Sales Quotes* listing screen will open.
- 2. Click on the drop-down arrow in the *Site* field and select from the list, the applicable site.
- Upon opening this screen, the *Status* field auto populates with 'New Quote'. You can click on the drop-down arrow in this field and select an <u>alternative</u> status from the list that will appear. For the purpose of this manual, the status will remain as New Quote.



#### Add Quote Default Items



- 1. Once you have selected the site,
- 2. the data grid will populate with all the *New Quotes* linked to that specific site.
- 3. Click on **Add**.

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- 1. The Add new Customer Quote screen will open.
- 2. You will note that the *Items* frame does not yet contain any item details.
- A customer needs to be selected <u>before</u> the default items will populate this frame. Click on the *search* icon in the *Customer Name* field.

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- 1. The 'Select a customer for this quote' screen will pop up.
- 2. Select the *row* of the customer that you wish to view.
- 3. Click on *Ok*.



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- 1. As the selected customer details populate the *Customer* frame,
- 2. the *Items* frame will populate with all the Default Quote Items as listed in the Quote Default Items screen.
- 3. You will note that the *recently added* default item (image 5) also appears here.
- Click on *Back* or *Close* (without saving any changes) to *exit* the 'Edit Customer Quote' screen and then *Close* the 'Sales Quotes' listing screen, to return to the *Quote Default Items* screen.



### Add Quote Default Items

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