

We are currently updating our site; thank you for your patience.

## SALES

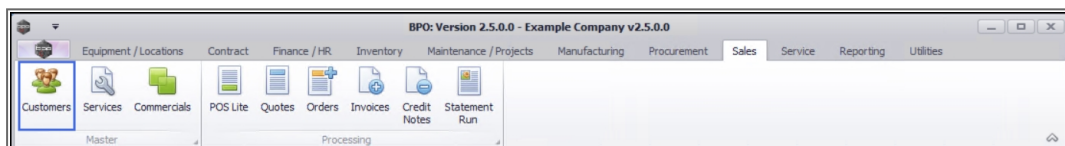
### CUSTOMERS – QUOTES

The **Quotes** tile direct you to the Sales Quotes listing screen for a selected Customer.

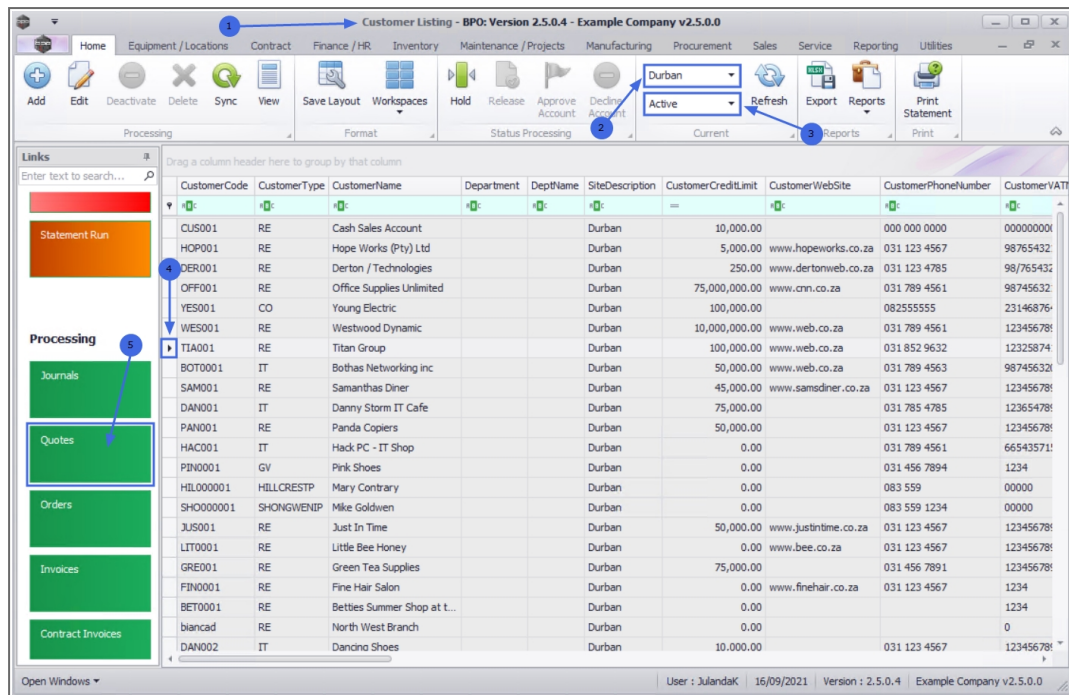
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**Ribbon Access:** Sales > Customers

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1. The **Customer Listing** screen will be displayed.
2. Select the Site where the customer can be located.
  - The example has **Durban** selected.
3. Select the **Status** for the customer.
  - The example has **Active** selected.
4. Select the **row** of the **customer** whose sales quotes you wish to work with.
5. Click on the **Quotes** tile.



6. The **Sales Quotes for Customer** [customer code] screen will display.
7. All the quotes for the selected customer will be listed.
8. The **Site** filter on this screen gives you the ability to change the site for the selected customer, where the customer has multiple sites.

## ADD QUOTE

9. Click on **Add**.



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

Sales Quotes for Customer TIA001 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Maintain Navigation Process Format Current

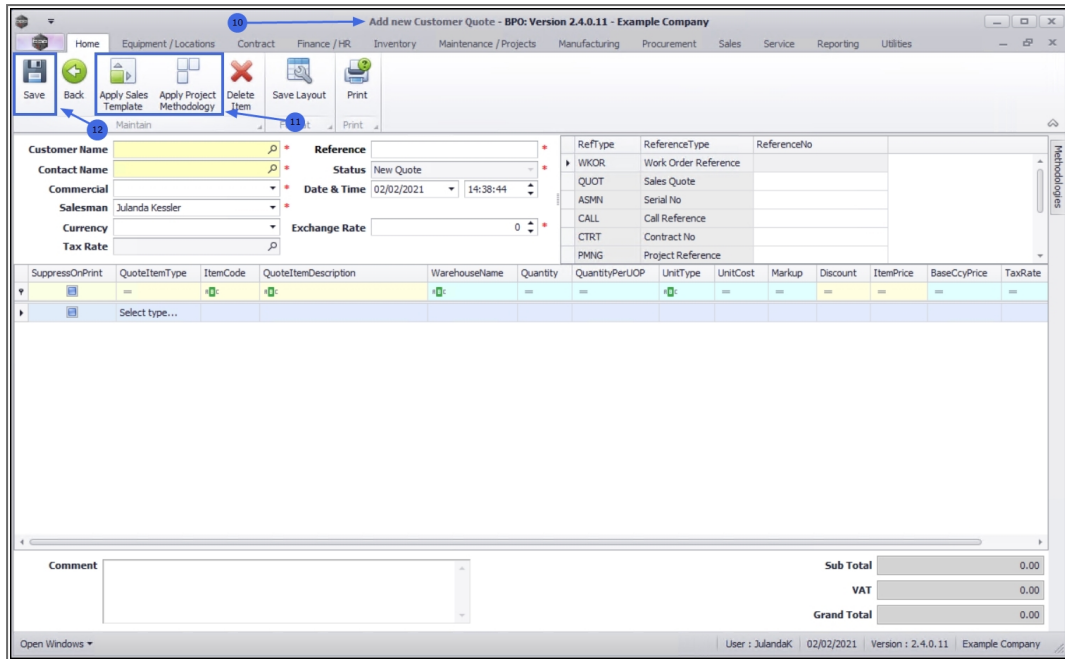
Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000028	TIA001	Titan Group	New Deal Renta...	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm...		I	A
QT0000029	TIA001	Titan Group	Part Request ch...	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm...		I	A
QT0000032	TIA001	Titan Group	test	1,154.27	ZAR	1.00	14.00	05/08/2014	Belinda Sharm...		I	A
QT0000034	TIA001	Titan Group	Parts not includ...	5,721.38	ZAR	1.00	14.00	20/08/2014	Belinda Sharm...		I	A
QT0000038	TIA001	Titan Group	CO 1234	3,448.52	ZAR	1.00	14.00	11/11/2014	Belinda Sharm...	Machine instal...	I	A
QT0000211	TIA001	Titan Group	1234	9,009.28	ZAR	1.00	15.00	02/03/2018	Bianca Du Toit		I	A
QT0000228	TIA001	Titan Group	test	920.00	ZAR	1.00	15.00	26/06/2018	Bianca Du Toit		R	A
QT0000238	TIA001	Titan Group	Copy of test	920.00	ZAR	1.00	15.00	26/06/2018	Bianca Du Toit		I	A

Open Windows

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10. "The Add new Customer Quote screen will display." on page 2
11. You have the option to **Apply a Sales Template** or **Apply a Project Methodology** to the new sales quote.
12. Click **Save** to save the quote as a New Quote and return to the **Customer Listing** screen.



## EDIT QUOTE



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

1. Select the **row** of the Sales Quote you wish to edit.
2. Click on **Edit**.



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



Sales Quotes for Customer HOP001 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

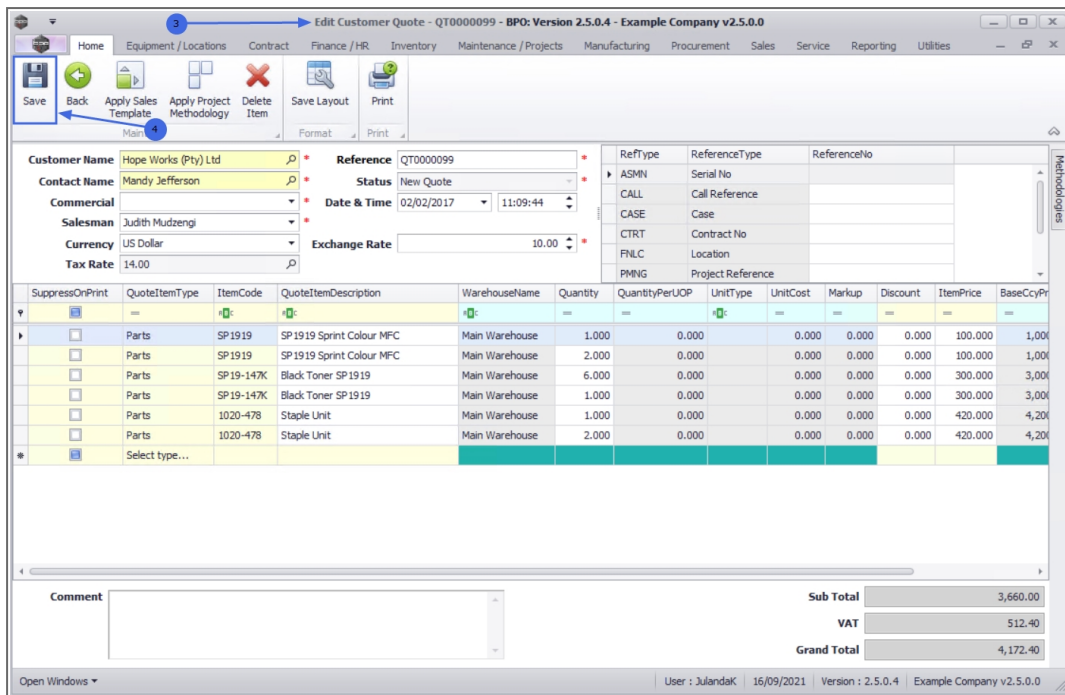
Add Edit Delete View Back Forward Accepted Rejected Convert Order Clone Quote Print Export Save Layout Workspaces Durban Refresh

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000088	HOP001	Hope Works (Pty) Ltd		1,112.00	ZAR		1.00	14.00 02/11/2016	Bianca Du Toit		N	A
QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR		1.00	14.00 02/11/2016	Bianca Du Toit		N	A
QT0000090	HOP001	Hope Works (Pty) Ltd		91,651.06	ZAR		1.00	14.00 03/11/2016	Bianca Du Toit		N	A
QT0000091	HOP001	Hope Works (Pty) Ltd		107,382.13	ZAR		1.00	14.00 03/11/2016	Bianca Du Toit		I	A
QT0000092	HOP001	Hope Works (Pty) Ltd		4,745.59	ZAR		1.00	14.00 03/11/2016	Bianca Du Toit		I	A
QT0000099	HOP001	Hope Works (Pty) Ltd	QT0000099	4,172.40	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A
QT0000102	HOP001	Hope Works (Pty) Ltd	BPO	855.00	ZAR		1.00	14.00 02/02/2017	Judith Mudzengi		N	A
QT0000104	HOP001	Hope Works (Pty) Ltd	stdm	114.00	ZAR		1.00	14.00 17/02/2017	Judith Mudzengi		A	A
QT0000105	HOP001	Hope Works (Pty) Ltd	nd1912 method...	22,062.25	ZAR		1.00	14.00 17/02/2017	Bianca Du Toit	link to metho...	N	A
QT0000107	HOP001	Hope Works (Pty) Ltd	testq	7,011.00	ZAR		1.00	14.00 02/03/2017	Judith Mudzengi		N	A
QT0000108	HOP001	Hope Works (Pty) Ltd	testq1	6,156.00	ZAR		1.00	14.00 02/03/2017	Judith Mudzengi		N	A
QT0000109	HOP001	Hope Works (Pty) Ltd	test quote with ...	1,714.56	USD	10.00	14.00	02/03/2017	Judith Mudzengi		N	A
QT0000110	HOP001	Hope Works (Pty) Ltd	QT0000110	6,328.27	ZAR		1.00	14.00 02/03/2017	Judith Mudzengi		N	A
QT0000111	HOP001	Hope Works (Pty) Ltd	QT0000111	6,258.60	ZAR		1.00	14.00 17/03/2017	Judith Mudzengi		N	A
QT0000112	HOP001	Hope Works (Pty) Ltd	546899732	4,617.00	ZAR		1.00	14.00 17/03/2017	Judith Mudzengi		N	A
QT0000113	HOP001	Hope Works (Pty) Ltd	qote13	6,156.00	ZAR		1.00	14.00 04/04/2017	Bianca Du Toit		N	A
QT0000114	HOP001	Hope Works (Pty) Ltd	1234	4,227.25	ZAR		1.00	14.00 12/04/2017	Bianca Du Toit	test	N	A
QT0000116	HOP001	Hope Works (Pty) Ltd	1234	4.10	ZAR		1.00	14.00 12/04/2017	Bianca Du Toit		I	A
QT0000117	HOP001	Hope Works (Pty) Ltd	Project quote	32,901.54	ZAR		1.00	14.00 13/04/2017	Judith Mudzengi		N	A
QT0000118	HOP001	Hope Works (Pty) Ltd	discount comme...	17,344.14	ZAR		1.00	14.00 13/04/2017	Judith Mudzengi		N	A
QT0000120	HOP001	Hope Works (Pty) Ltd	Retest	21,931.32	USD	7.00	14.00	20/04/2017	Judith Mudzengi		N	A

Open Windows User : JulandaK 16/09/2021 Version : 2.5.0.4 Example Company v2.5.0.0

3. "The Edit Customer Quote - KZQT [ ] screen will display." on page 2
  - You have the option to **Apply a Sales Template** and **Apply a Project Methodology** to the already created sales quote.
  - Make changes to the **Heading Information** or to Items in the **Sales Items grid**.
4. Click on **Save** to save the changes to the Sales Quote and return to the **Customer Listing** screen.



## DELETE QUOTE



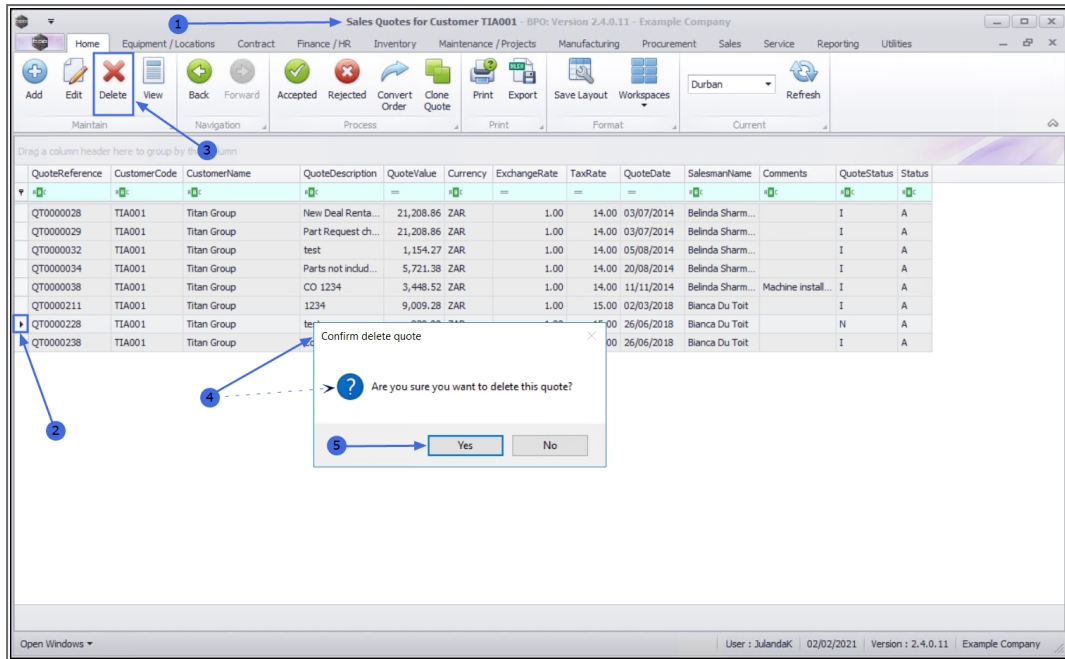
Only Quotes with a N - New Quote in the Quote Status column can be deleted.

1. From the **Sales Quotes for Customer** [customer code] listing 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 **Process** 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** if you are certain about your selection.



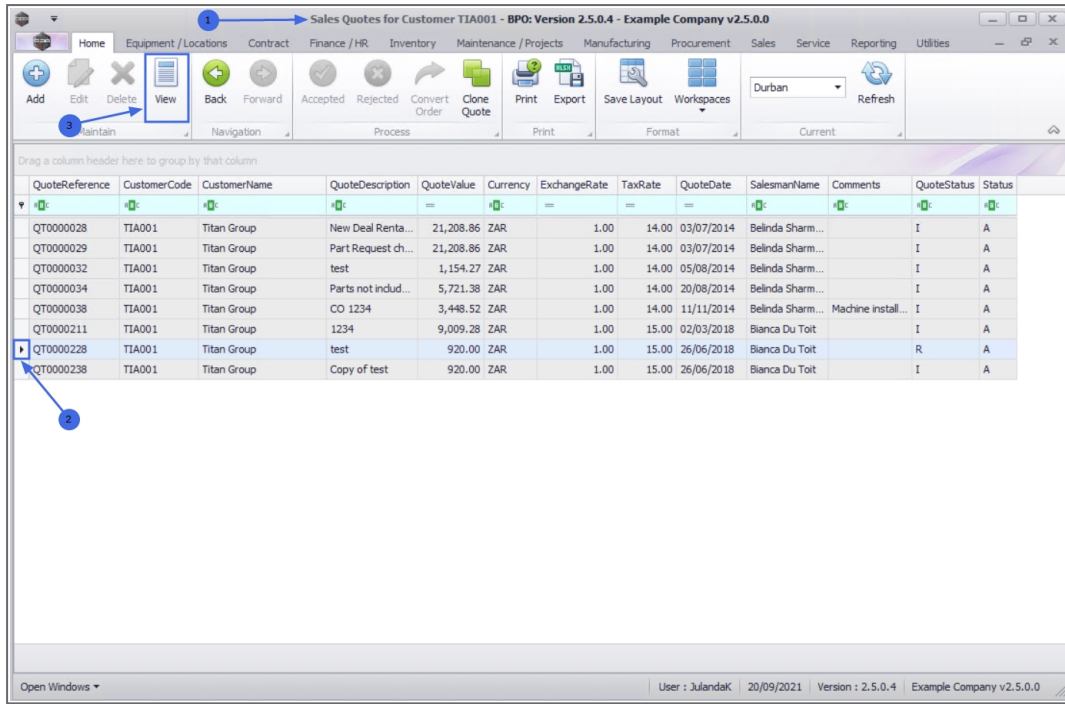
The Sales Quote will be **removed** from the **Sales Quotes for Customer** listing screen.

## VIEW QUOTE



A Quote in any Quote Status can be Viewed.

1. From the **Sales Quotes for Customer** [customer code] listing screen,
2. Click on the **row** of the Sales Quote you wish to **view**.
3. Click on **View**

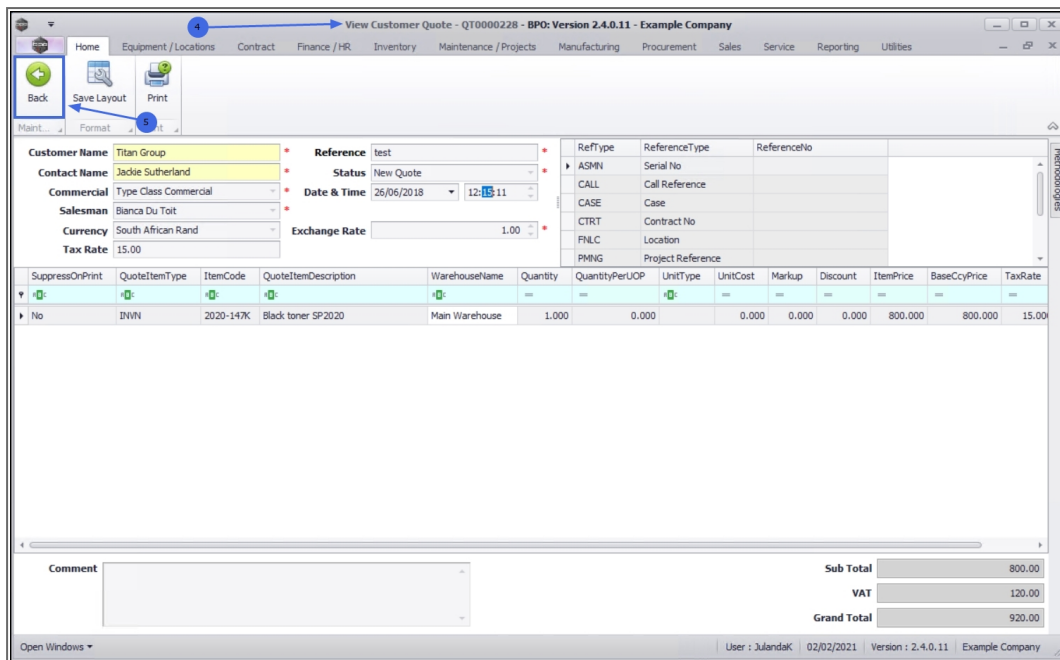


4. The **View Customer Quote - QT[quote number]** screen will display.



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

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



## FORWARD NAVIGATION

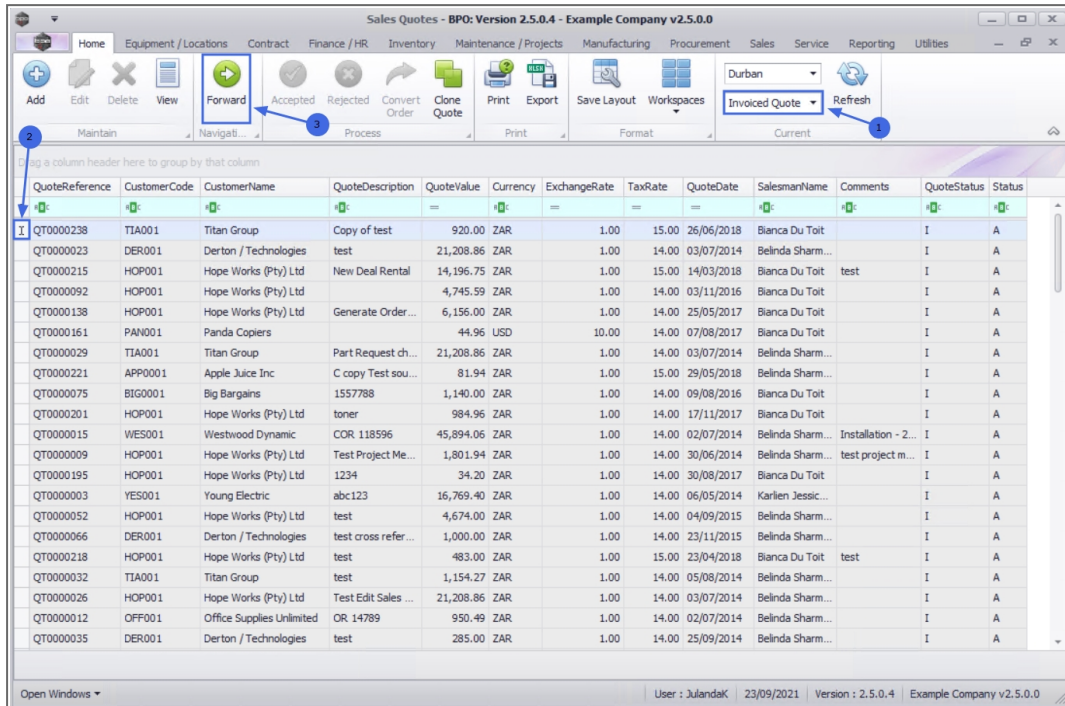
The *Forward* navigation button is only available in the Invoiced Quote status after the Sales Quote has been Converted to Order.

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 from the selected Sales Quote.

1. Change the Status to **Invoiced Quote** to display a list of all invoiced quotes.
2. Click on the **row** of the Invoiced Quote that 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**.



QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000238	TIA001	Titan Group	Copy of test	920.00	ZAR	1.00	15.00	26/06/2018	Bianca Du Toit		I	A
QT0000023	DER001	Derton / Technologies	test	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm...		I	A
QT0000215	HOP001	Hope Works (Pty) Ltd	New Deal Rental	14,196.75	ZAR	1.00	15.00	14/03/2018	Bianca Du Toit	test	I	A
QT0000092	HOP001	Hope Works (Pty) Ltd	Generate Order...	4,745.59	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		I	A
QT0000138	HOP001	Hope Works (Pty) Ltd	Generate Order...	6,156.00	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		I	A
QT0000161	PAN001	Panda Copiers		44.96	USD	10.00	14.00	07/08/2017	Bianca Du Toit		I	A
QT0000029	TIA001	Titan Group	Part Request ch...	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm...		I	A
QT0000221	APP0001	Apple Juice Inc	C copy Test sou...	81.94	ZAR	1.00	15.00	29/05/2018	Belinda Sharm...		I	A
QT0000075	BIG0001	Big Bargains	1557788	1,140.00	ZAR	1.00	14.00	09/08/2016	Bianca Du Toit		I	A
QT0000201	HOP001	Hope Works (Pty) Ltd	toner	984.96	ZAR	1.00	14.00	17/11/2017	Bianca Du Toit		I	A
QT0000015	WES001	Westwood Dynamic	COR 118596	45,894.06	ZAR	1.00	14.00	02/07/2014	Belinda Sharm...	Installation - 2...	I	A
QT0000009	HOP001	Hope Works (Pty) Ltd	Test Project Me...	1,801.94	ZAR	1.00	14.00	30/06/2014	Belinda Sharm...	test project m...	I	A
QT0000195	HOP001	Hope Works (Pty) Ltd	1234	34.20	ZAR	1.00	14.00	30/08/2017	Bianca Du Toit		I	A
QT0000003	YES001	Young Electric	abc123	16,769.40	ZAR	1.00	14.00	06/05/2014	Karlien Jessic...		I	A
QT0000052	HOP001	Hope Works (Pty) Ltd	test	4,674.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm...		I	A
QT0000066	DER001	Derton / Technologies	test cross refer...	1,000.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm...		I	A
QT0000218	HOP001	Hope Works (Pty) Ltd	test	483.00	ZAR	1.00	15.00	23/04/2018	Bianca Du Toit	test	I	A
QT0000032	TIA001	Titan Group	test	1,154.27	ZAR	1.00	14.00	05/08/2014	Belinda Sharm...		I	A
QT0000026	HOP001	Hope Works (Pty) Ltd	Test Edit Sales ...	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm...		I	A
QT0000012	OFF001	Office Supplies Unlimited	OR 14789	950.49	ZAR	1.00	14.00	02/07/2014	Belinda Sharm...		I	A
QT0000035	DER001	Derton / Technologies	test	285.00	ZAR	1.00	14.00	25/09/2014	Belinda Sharm...		I	A

## BACK NAVIGATION

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



Sales Orders - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Add Edit Delete View Back Forward Create Invoice Create New Deal Add Items to WO New Deal Project Save Layout Workspaces Print Sales Order Print Proforma Invoice Export Durban Refresh

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode
OR0000207	NET001	Networking and Lapto...	New order	test	564.30	ZAR	03/08/2017	Blanca Du Toit	1.00	14.00	01:10:42	
OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10	ZAR	14/08/2017	Blanca Du Toit	1.00	1.00	11:18:17	
OR0000220	BET0001	Betties Summer Shop ...	New order	1234	23,029.07	ZAR	21/08/2017	Blanca Du Toit	1.00	14.00	11:49:29	
OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Blanca Du Toit	1.00	14.00	14:49:36	
OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Blanca Du Toit	10.00	0.00	02:50:18	
OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Blanca Du Toit	1.00	15.00	02:58:26	
OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Blanca Du Toit	1.00	14.00	14:16:30	
OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Blanca Du Toit	1.00	15.00	16:47:51	
OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:48:13	
OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:50:21	
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:51:52	
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:58:22	
OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:59:34	
OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	05:06:46	
OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Blanca Du Toit	1.00	15.00	10:46:59	
OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21	
OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25	
OR0000304	OFF001	Office Supplies Unlimit...	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalande	1.00	15.00	10:27:06	
OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51	
OR0000308	TIA001	Titan Group	New order	MRTTest	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44	

Open Windows User : JulandaK 23/09/2021 Version : 2.5.0.4 Example Company v2.5.0.0

## ACCEPT QUOTE



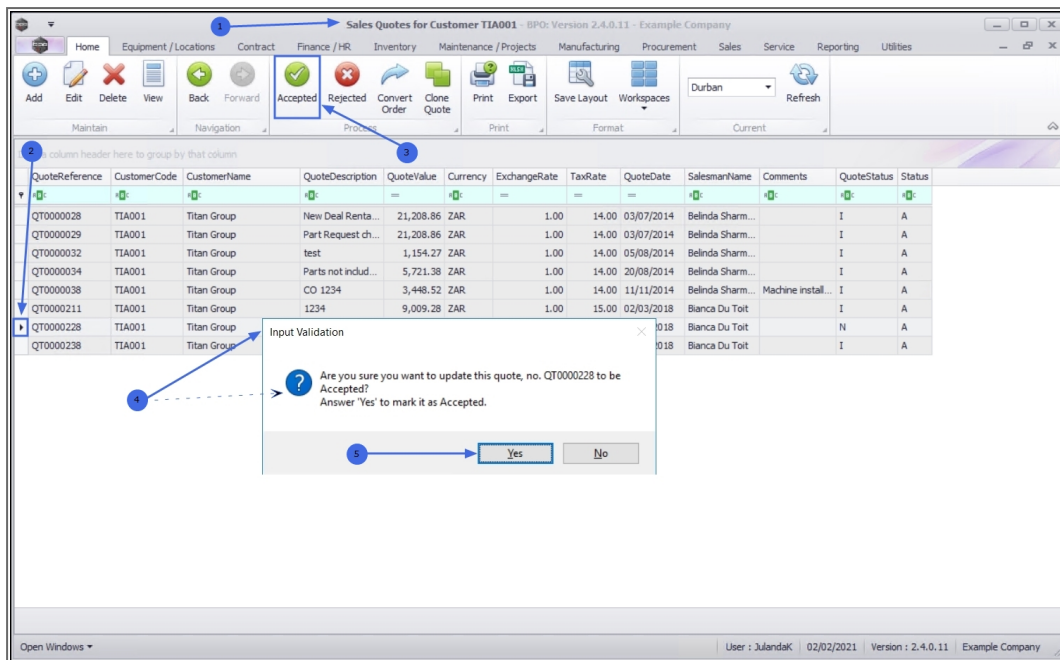
Only quotes with a N - New Quote in the Quote Status can be Accepted.

1. From the **Sales Quotes for Customer** [customer code] listing 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. The **Input Validation** message screen, will prompt for your response;
  - **Are you sure you want to update this quote, no. [ ] to be Accepted? Answer 'Yes' to mark it as Accepted.**
5. If you are sure of your selection, click **Yes** to proceed.



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 Customer [customer code]** listing screen,
2. Click on the **row** of the Sales Quote you that needs to be **rejected**.
3. Click on **Rejected**.



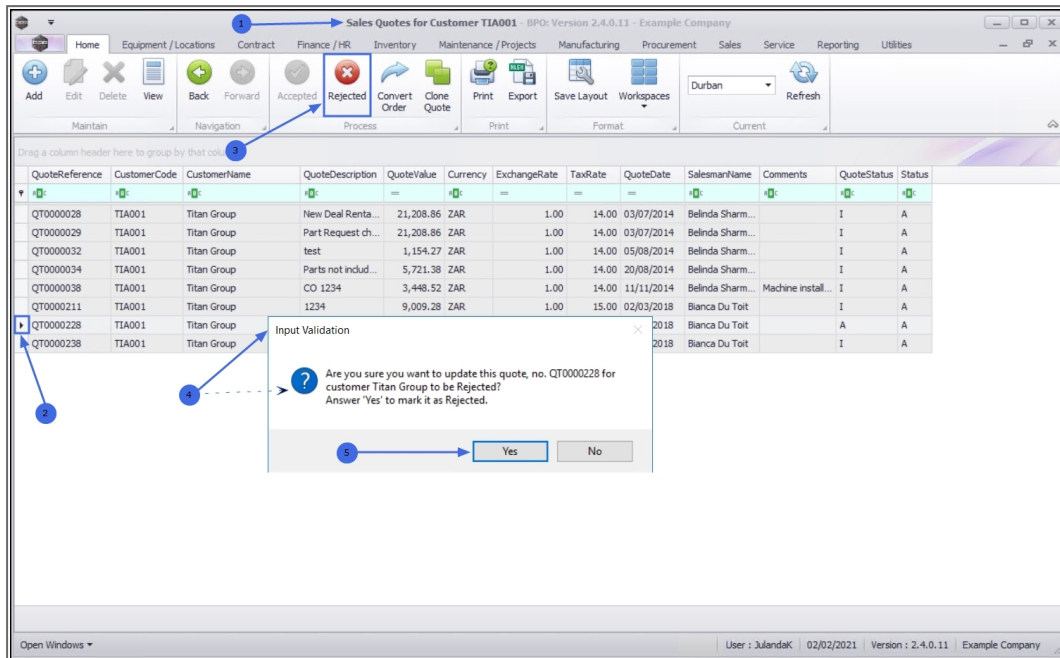
Short cut key: Right click to display the **All groups** menu list. Click on **Rejected**.

4. The **Input Validation** screen, will prompt your response;
  - **Are you sure you want to update this quote, no. QT[quote number] to be Rejected? Answer 'Yes' to mark it as**



## Rejected.

5. If you are sure of your selection, click **Yes** to proceed.



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 Customer [customer code]** listing screen,
2. Click on the **row** of the Sales Quote that you wish to **convert** to a sales order.
3. Click on **Convert Order**.



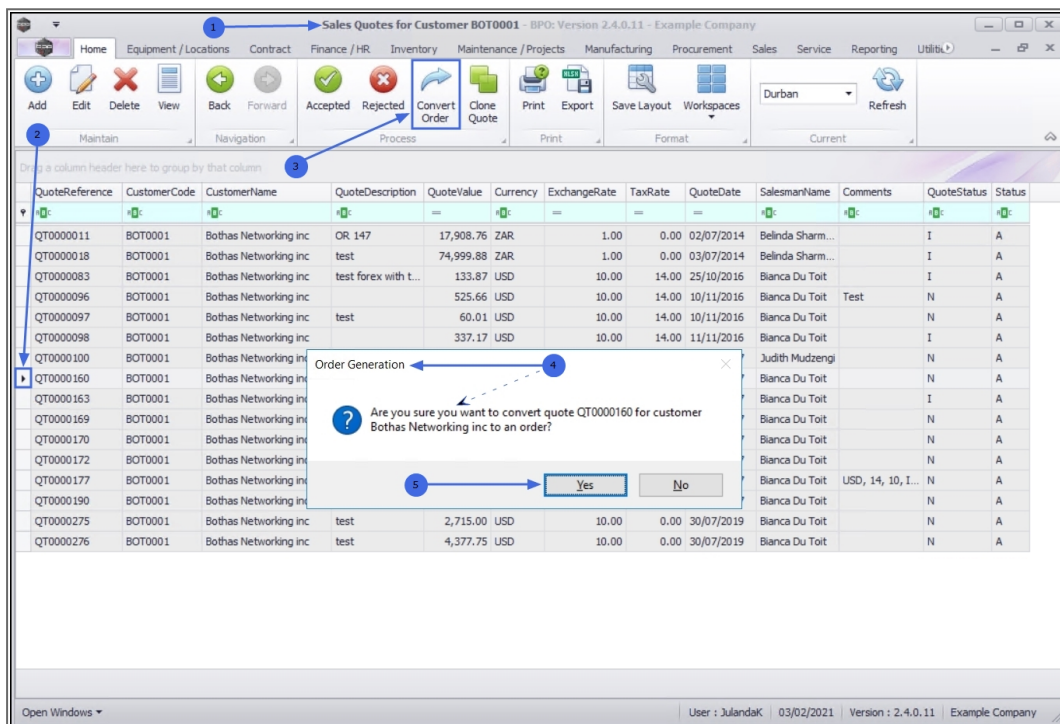
Short cut key: Right click to display the **All groups** menu list. Click on **Order**.



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

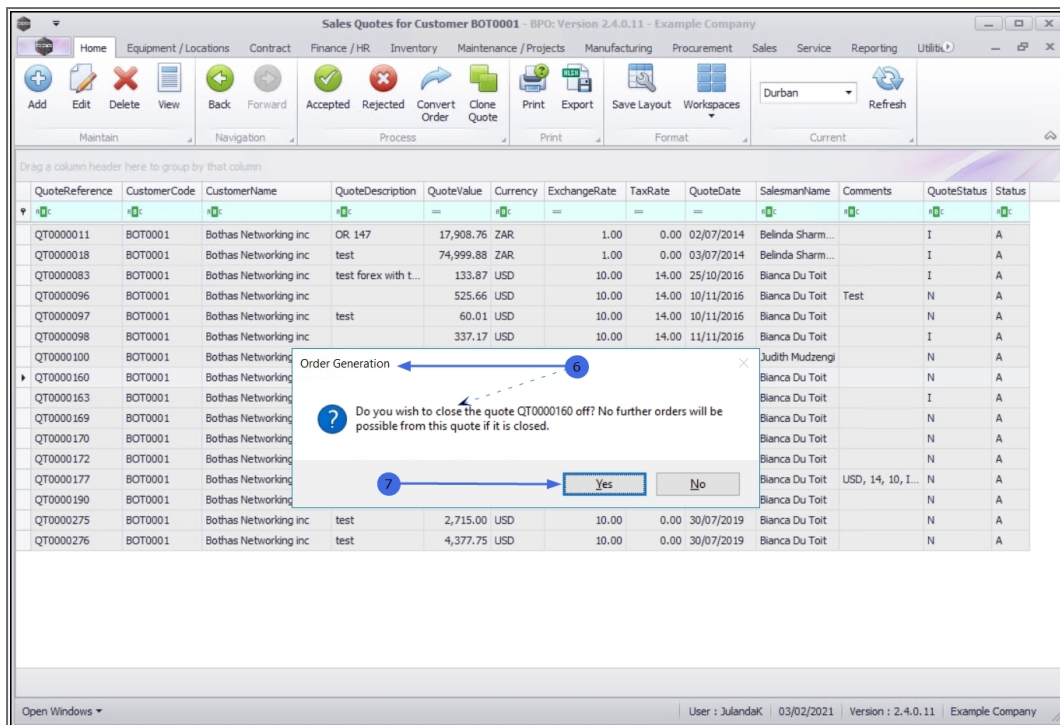
## First Order Generation message

4. The **Order Generation** message will prompt for your response;
  - Are you sure you want to convert quote QT[quote number], for Customer [customer code] to an order?
5. Click on **Yes**, if you are certain about your selection.



## Second Order Generation message

6. The **Order Generation** message will prompt for confirmation;
  - Do you wish to close the quote QT[quote number] off? No further orders will be possible from this quote if it is closed.
7. If you are sure of your selection, click **Yes** to proceed.



## Third Order Generation message

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

Sales Quotes for Customer BOT0001 - BPO: Version 2.4.0.11 - Example Company

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
QT0000011	BOT0001	Bothas Networking inc	OR 147	17,908.76	ZAR	1.00	0.00	02/07/2014	Belinda Sharm...		I	A
QT0000018	BOT0001	Bothas Networking inc	test	74,999.88	ZAR	1.00	0.00	03/07/2014	Belinda Sharm...		I	A
QT0000083	BOT0001	Bothas Networking inc	test forex with t...	133.87	USD	10.00	14.00	25/10/2016	Blanca Du Toit		I	A
QT0000096	BOT0001	Bothas Networking inc		525.66	USD	10.00	14.00	10/11/2016	Blanca Du Toit	Test	N	A
QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Blanca Du Toit		N	A
QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00	14.00	11/11/2016	Blanca Du Toit		I	A
QT0000100	BOT0001	Bothas Networking inc							Judith Mudzengi		N	A
QT0000160	BOT0001	Bothas Networking inc							Blanca Du Toit		N	A
QT0000163	BOT0001	Bothas Networking inc							Blanca Du Toit		I	A
QT0000169	BOT0001	Bothas Networking inc							Blanca Du Toit		N	A
QT0000170	BOT0001	Bothas Networking inc							Blanca Du Toit		N	A
QT0000172	BOT0001	Bothas Networking inc							Blanca Du Toit		N	A
QT0000177	BOT0001	Bothas Networking inc							Blanca Du Toit	USD, 14, 10, 1...	N	A
QT0000190	BOT0001	Bothas Networking inc							Blanca Du Toit		N	A
QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Blanca Du Toit		N	A
QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Blanca Du Toit		N	A

Order Generation

Do you wish to view the order created, no. OR0000315?

Yes No

Open Windows User : JulandaK 03/02/2021 Version : 2.4.0.11 Example Company

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

Sales Orders - BPO: Version 2.4.0.11 - Example Company

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

Add Edit Delete View Back Forward Create Invoice Create New Deal Add Items to WO New Deal Project Save Layout Workspaces Print Sales Order Print Proforma Invoice Export Durban Refresh

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode
OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Blanca Du Toit	1.00	15.00	16:47:51	
OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:48:13	
OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:50:21	
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:51:52	
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:58:22	
OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:59:34	
OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	05:06:46	
OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Blanca Du Toit	1.00	15.00	10:12:42	
OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Blanca Du Toit	1.00	15.00	10:46:59	
OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21	
OR0000302	PIN0001	Pink Shoes	New order	test email	724,895.60	ZAR	08/04/2020	Kame Pillay	1.00	15.00	09:51:43	
OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25	
OR0000304	OFF001	Office Supplies Unlimit...	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06	
OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51	
OR0000307	PIN0001	Pink Shoes	New order	new quote1	245,525.00	ZAR	21/04/2020	Kame Pillay	1.00	15.00	14:25:03	
OR0000308	TIA001	Titan Group	New order	MRTTest	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44	
OR0000309	PIN0001	Pink Shoes	New order	new order	115.00	ZAR	23/04/2020	Kame Pillay	1.00	15.00	01:50:39	
OR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17	
OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Blanca Du Toit	10.00	14.00	16:53:27	
OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Blanca Du Toit	10.00	0.00	11:29:40	

Open Windows User : JulandaK 03/02/2021 Version : 2.4.0.11 Example Company

For a detailed handling of this topic refer to [Quotes - Convert to Sales Order](#)

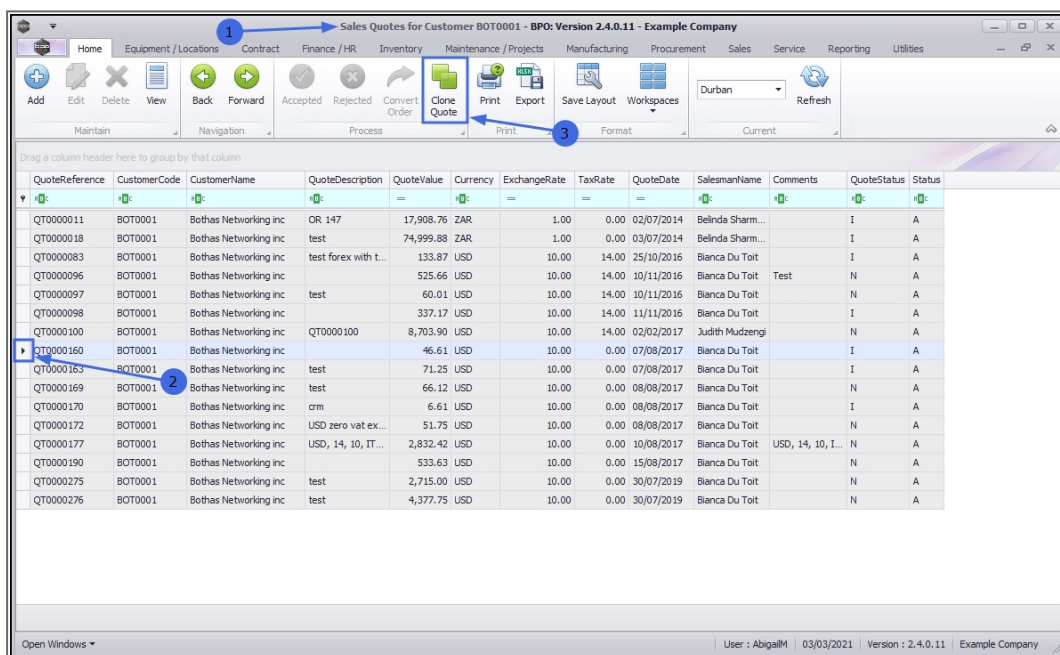
## CLONE A QUOTE

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 Customer [customer code]** 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**.



QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000011	BOT0001	Bothas Networking inc	OR 147	17,908.76	ZAR	1.00	0.00	02/07/2014	Belinda Sham...		I	A
QT0000018	BOT0001	Bothas Networking inc	test	74,999.88	ZAR	1.00	0.00	03/07/2014	Belinda Sham...		I	A
QT0000083	BOT0001	Bothas Networking inc	test forex with t...	133.87	USD	10.00	14.00	25/10/2016	Bianca Du Toit		I	A
QT0000096	BOT0001	Bothas Networking inc		525.66	USD	10.00	14.00	10/11/2016	Bianca Du Toit	Test	N	A
QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	A
QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00	14.00	11/11/2016	Bianca Du Toit		I	A
QT0000100	BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A
QT0000160	BOT0001	Bothas Networking inc		46.61	USD	10.00	0.00	07/08/2017	Bianca Du Toit		I	A
QT0000163	BOT0001	Bothas Networking inc	test	71.25	USD	10.00	0.00	07/08/2017	Bianca Du Toit		I	A
QT0000169	BOT0001	Bothas Networking inc		66.12	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	A
QT0000170	BOT0001	Bothas Networking inc	crm	6.61	USD	10.00	0.00	08/08/2017	Bianca Du Toit		I	A
QT0000172	BOT0001	Bothas Networking inc	USD zero vat ex...	51.75	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	A
QT0000177	BOT0001	Bothas Networking inc	USD, 14, 10, IT...	2,832.42	USD	10.00	0.00	10/08/2017	Bianca Du Toit	USD, 14, 10, I...	N	A
QT0000190	BOT0001	Bothas Networking inc		533.63	USD	10.00	0.00	15/08/2017	Bianca Du Toit		N	A
QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A
QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A

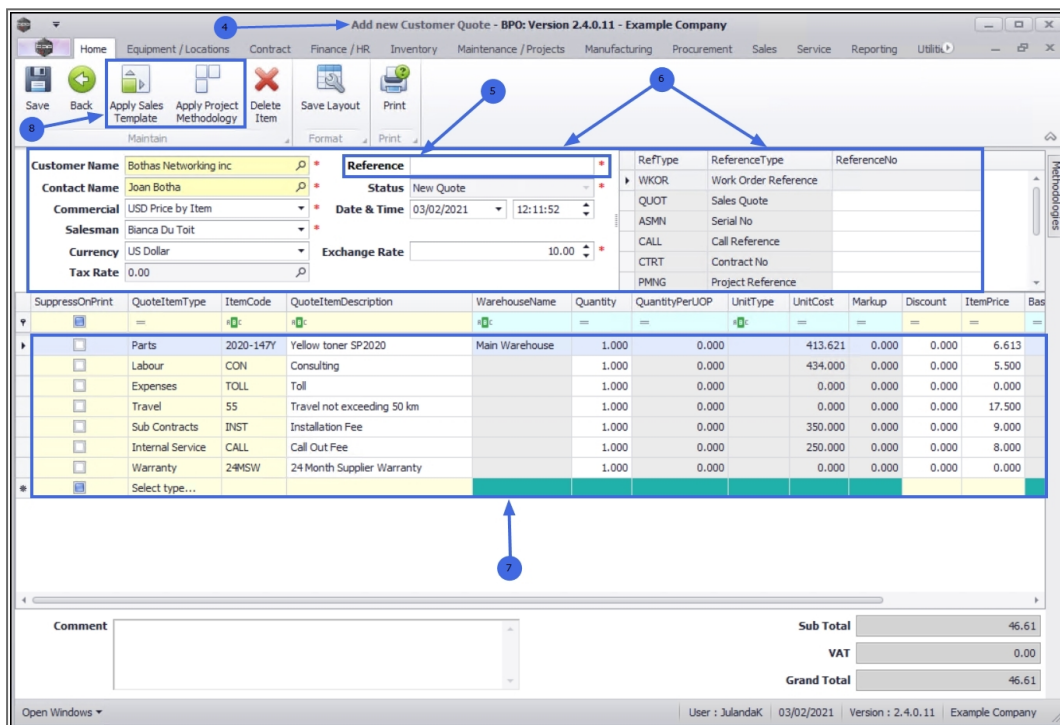


4. The **Add new Customer Quote** screen will display.



It is important that a new 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 any **Item details**, if required.
7. You can also choose to apply a **Sales Template**, which will be appended to the existing quote items, and / or apply a **Project Methodology** to the cloned quote, if required.



**Add new Customer Quote - BPO: Version 2.4.0.11 - Example Company**

Customer Name: Bothas Networking Inc. | Status: New Quote | Date & Time: 03/02/2021 12:11:52 | Exchange Rate: 10.00

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

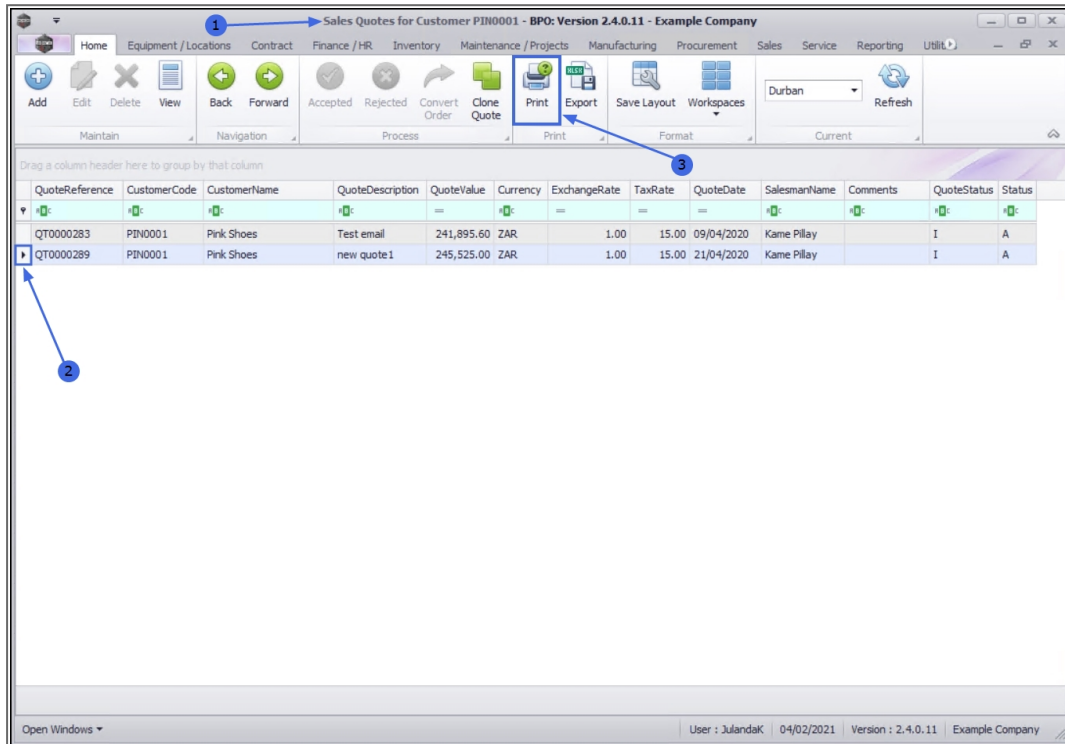
SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice
<input type="checkbox"/>	Parts	2020-147Y	Yellow toner SP2020	Main Warehouse	1.000	0.000		413.621	0.000	0.000	6.613
<input type="checkbox"/>	Labour	CON	Consulting		1.000	0.000		434.000	0.000	0.000	5.500
<input type="checkbox"/>	Expenses	TOLL	Toll		1.000	0.000		0.000	0.000	0.000	0.000
<input type="checkbox"/>	Travel	55	Travel not exceeding 50 km		1.000	0.000		0.000	0.000	0.000	17.500
<input type="checkbox"/>	Sub Contracts	INST	Installation Fee		1.000	0.000		350.000	0.000	0.000	9.000
<input type="checkbox"/>	Internal Service	CALL	Call Out Fee		1.000	0.000		250.000	0.000	0.000	8.000
<input type="checkbox"/>	Warranty	24MSW	24 Month Supplier Warranty		1.000	0.000		0.000	0.000	0.000	0.000
<input type="checkbox"/>	Select type...										

Sub Total: 46.61  
VAT: 0.00  
Grand Total: 46.61

For a detailed review of this procedure click on the link to redirect to [Quotes - Clone a Quote.](#)

## PRINT QUOTE

1. From the **Sales Quotes for Customer** [customer code] listing screen,
2. Click on the **row** of the Quote you wish to print.
3. Click on **Print**.



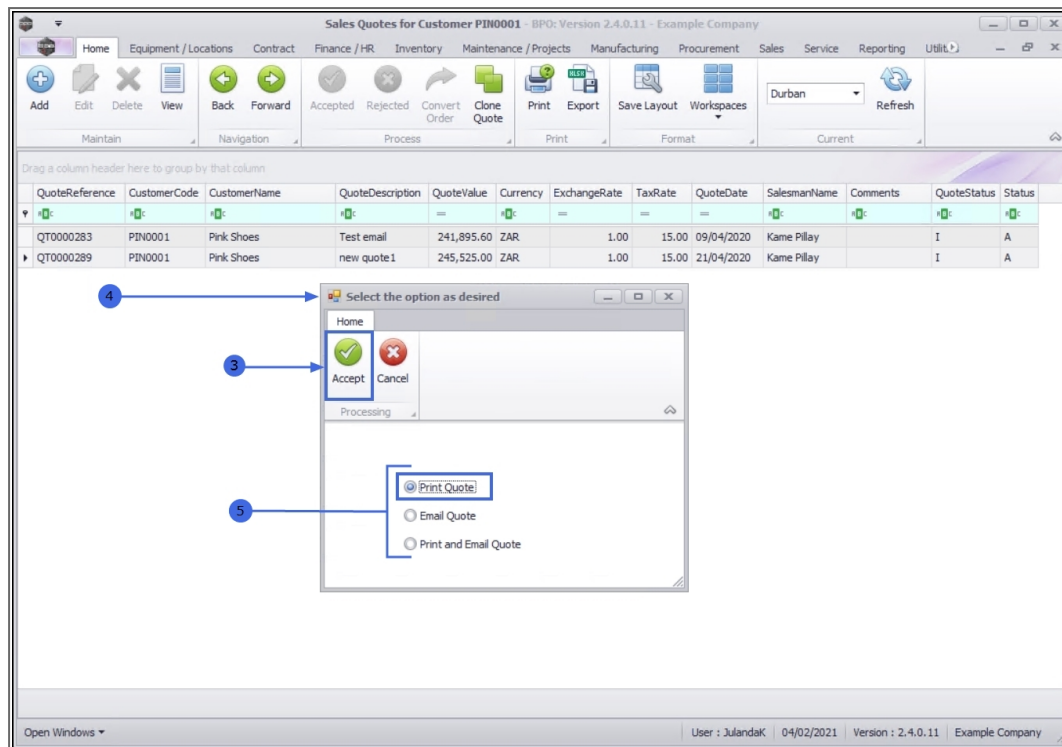
4. The **Select the option as desired** message screen will display.
5. Click on the **radio button** of the option you require.



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 **Accept** to proceed.



7. The Sales Quote will display in the **Preview** screen.
8. From here 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 Customer** screen.





