

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.

Ribbon Access: Sales > Customers

\$	Ŧ							BPO:	Version 2.5.0.0 - Exa	mple Company v	2.5.0.0					_ – x
		Equipment	t / Locations	Contract	Financ	e / HR	Inventor	y Ma	aintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
2	67	Z	-				¢									
Cust	tomers	Services	Commercials	POS Lite	Quotes	Orders	Invoices	Credit Notes	Statement Run							
		Master	4			Proce	essing									\diamond

- 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.



-		1-		Customer Listing	BPO: Versio	n 2.5.0.4 - E	xample Compa	any v2.5.0.0		-	
😜 н	ome Equipr	ment / Locations	Contract Fin	ance / HR Inventory	Maintenance	/ Projects	Manufacturing	Procurement Sa	ales Service Repo	rting Utilities	- 8 >
e 🍃		XQ		2	4	P		ırban 🝷 🤇	8 🛱 🛍		
Add Edit	t Deactivate	Delete Sync	View Save	Layout Workspaces H	old Release	Approve Account	Decline Ac	tive - Re	fresh Export Repor	ts Print Statement	
	Proces	sina		Format	Statue	Processing	2	Current	3 Reports	Print	6
inks				romac a	510103	rioceaning		current	a Reports		
	arch P	Drag a column hea		p by that column							
nter text to s	earch p	CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerV
		♥ #■c	8∎c	R O C	1 0 0	8 🖬 c	s 🛛 c	-	* 0 ¢	8 0 0	A C
Statement	Run	CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	00000000
Statement	- Rull	HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	98765432
		4 DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/765432
		OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	98745632
		YES001	со	Young Electric			Durban	100,000.00		082555555	23146876
		WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	12345678
Processin	ig 5	TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	12325874
Journals		BOT0001	π	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	987456320
Journals		SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	12345678
		DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	12365478
	1	PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	12345678
Quotes		HAC001	Π	Hack PC - IT Shop			Durban	0.00		031 789 4561	66543571
		PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
		HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
Orders		SHO000001	SHONGWENIP	Mike Goldwen			Durban	0.00		083 559 1234	00000
		JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	12345678
		LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	12345678
Invoices		GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	12345678
		FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
		BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234
Contract I	nvoices	biancad	RE	North West Branch			Durban	0.00			0
		DAN002	π	Dancing Shoes			Durban	10.000.00		031 123 4567	12345678

- 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.



- 10. "The Add new Customer Quote screen will display." on page 2
- 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 **Cus**tomer Listing screen.



â ∓			10-	>	Add new Cu	istomer Quote - B	PO: Version	2.4.0.11 - Exam	ple Company						_ [🗆]	×
B H	ome	Equipment / Local	tions Cont	ract Finance / HR	Inventory	Maintenance / Pro	ojects M	anufacturing	Procurement	Sales	Service	Reporting	Utilities		_ 8	
Save Back	Appl Ter	ly Sales Apply Promplate Methodo	oiect Delete	Save Layout Print												~
Customer	12						.	RefType	ReferenceType		ReferenceNo					٦
Contact N					New Quote			WKOR	Work Order Re	ference						î
Contact in				 Date & Time 	-			QUOT	Sales Quote							
		Julanda Kessler		• • Date & fille	02/02/2021	14.30.44	•	ASMN	Serial No							
Curr				 Exchange Rate 			• ‡ •		Call Reference							
	Rate			P			Ŧ		Contract No							
SuppressOn	Drint	QuoteItemType	ItemCode	QuoteItemDescription		WarehouseName	Quantity	PMNG QuantityPerUOP	Project Referen P UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	-
Suppression	211119	Quoteitemi ype	ItemCode			vvarenouservame	Quantity	QuantityPerUOF	P Uniti ype	UnitCost	Markup	Discount	Itemprice	BaseCcyPrice	TaxRate	1
•		Select type														-
Comme	ent					A.						Sub Tot V/	т		0.00	D
Open Windows	+					×				User : .		Grand Tot	_	4.0.11 Exampl	0.00 e Company	

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.



₽ , ₹			6		Sales Quotes for 0	Customer HO	P001 - BP0): Version 2.5.0	.4 - Exampl	e Company v	2.5.0.0			_)[)
	Home	Equipment	/Locations	Contract	Finance / HR Inv	entory Mai	ntenance /	Projects Man	ufacturing	Procurement	Sales Ser	vice Reporting) Utilities	-	8	
Add	Edit	Delete View	Back	Forward	Accepted Rejected	Convert Clor Order Quo		t Export Sa	ave Layout	Workspaces	Durban	- Refresh				
-	Mainta	ain	10 Naviga	tion	Process	Order Quo		Print	Forma	+	urre	nt				
	Pitali i ta		Haviga		FIOCESS			7	T QUIL		Guite	- A		1		
								7			8					
Quote	Reference	e CustomerCo	de Customer	rName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status		
REC		#EC	RBC		R D C	-	-B:	-	-	-	A D C	x 🛛 c	NDC .	* 0 :		
QT00	00088	HOP001	Hope Wo	orks (Pty) Ltd		1,112.00	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		Ν	A		
QT00	00089	HOP001	Hope Wo	orks (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	A		
QT00	00090	HOP001	Hope Wo	orks (Pty) Ltd	L .	91,651.06	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		N	A		
QT00	00091	HOP001	Hope Wo	orks (Pty) Ltd	l i	107,382.13	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		I	A		
QT00	00092	HOP001	Hope Wo	orks (Pty) Ltd	E	4,745.59	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		I	A		
QT00	00099	HOP001	Hope Wo	orks (Pty) Ltd	QT000099	4,172.40	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A		
QT00	00102	HOP001	Hope Wo	orks (Pty) Ltd	BPO	855.00	ZAR	1.00	14.00	02/02/2017	Judith Mudzengi		N	Α		
QT00	00104	HOP001	Hope Wo	orks (Pty) Ltd	stdm	114.00	ZAR	1.00	14.00	17/02/2017	Judith Mudzengi		A	A		
QT00	00105	HOP001	Hope Wo	orks (Pty) Ltd	nd 1912 method	22,062.25	ZAR	1.00	14.00	17/02/2017	Bianca Du Toit	linke to metho	N	Α		
QT00	00107	HOP001	Hope Wo	orks (Pty) Ltd	testq	7,011.00	ZAR	1.00	14.00	02/03/2017	Judith Mudzengi		Ν	Α		
QT00	00108	HOP001	Hope Wo	orks (Pty) Ltd	testq1	6,156.00	ZAR	1.00	14.00	02/03/2017	Judith Mudzengi		Ν	A		
QT00	00109	HOP001	Hope Wo	orks (Pty) Ltd	test quote with	1,714.56	USD	10.00	14.00	02/03/2017	Judith Mudzengi		Ν	Α		
QT00	00110	HOP001	Hope Wo	orks (Pty) Ltd	QT0000110	6,328.27	ZAR	1.00	14.00	02/03/2017	Judith Mudzengi		Ν	Α		
QT00	00111	HOP001	Hope Wo	orks (Pty) Ltd	QT0000111	6,258.60	ZAR	1.00	14.00	17/03/2017	Judith Mudzengi		Ν	A		
QT00	00112	HOP001	Hope Wo	orks (Pty) Ltd	546899732	4,617.00	ZAR	1.00	14.00	17/03/2017	Judith Mudzengi		Ν	A		
QT00	00113	HOP001	Hope Wo	orks (Pty) Ltd	qote 13	6,156.00	ZAR	1.00	14.00	04/04/2017	Bianca Du Toit		Ν	Α		
QT00	00114	HOP001	Hope Wo	orks (Pty) Ltd	1234	4,227.25	ZAR	1.00	14.00	12/04/2017	Bianca Du Toit	test	Ν	Α		
QT00	00116	HOP001	Hope Wo	orks (Pty) Ltd	1234	4.10	ZAR	1.00	14.00	12/04/2017	Bianca Du Toit		I	Α		
QT00	00117	HOP001	Hope Wo	orks (Pty) Ltd	Project quote	32,901.54	ZAR	1.00	14.00	13/04/2017	Judith Mudzengi		Ν	Α		
QT00	00118	HOP001	Hope Wo	orks (Pty) Ltd	discount comme	17,344.14	ZAR	1.00	14.00	13/04/2017	Judith Mudzengi		Ν	Α		
QT00	00120	HOP001	Hope Wo	orks (Pty) Ltd	Retest	21,931.32	USD	7.00	14.00	20/04/2017	Judith Mudzengi		Ν	Α		
	indows 🔻									User : Julandal	K 16/09/2021	Version : 2.5.0.	4 Example C			-

- 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.



	oly Project thodology		t	Maintenance / Projec	cts Ma	anut	facturing Pi	rocurement Sa	les Servio	ce Repo	rting Utili	ties	- 8		
Apply Sales App Template Me Main 4	bly Project Delete thodology Item	Save Layout Print	t												
Template Me Main 4 Hope Works (thodology Item														
Hope Works (Ptv) I td	. Format . Print													
	Phy) I th														
Mandy Jaffar		P * Reference	QT0000099				RefType	ReferenceType	Re	eferenceNo					
ine manuy Jerrei	son	۶ * Status	New Quote		-	•	ASMN	Serial No							
cial		▼ * Date & Time	02/02/2017	▼ 11:09:44	\$		CALL	Call Reference							
nan Judith Mudze	ngi	* *				-	CASE	Case							
ncy US Dollar		 Exchange Rate 	2	10.0	0 🗘 *										
ate 14.00		Q							ice.						
rint OuoteItemT	/pe ItemCode	OuoteItemDescription		WarehouseName	Quantity	v			UnitCost	Markup	Discount	ItemPrice	BaseCc		
-	R C	*Dc		* 0 ¢	=		=	a 🗖 c	-	-	-	-	-		
Parts	SP1919	SP 1919 Sprint Colour MP	÷C	Main Warehouse	1.0	000		0.000	0.000	0.000	0.000	100.000	1,		
Parts	SP1919	SP 19 19 Sprint Colour MF	°C	Main Warehouse	2.0	000		0.000	0.000	0.000	0.000	100.000	1,		
Parts	SP19-147K	Black Toner SP1919		Main Warehouse	6.0	000		0.000	0.000	0.000	0.000	300.000	З,		
Parts	SP19-147K	Black Toner SP1919		Main Warehouse	1.0	000		0.000	0.000	0.000	0.000	300.000	3,		
Parts	1020-478	Staple Unit		Main Warehouse	1.0	000	1	0.000	0.000	0.000	0.000	420.000	4,		
Parts	1020-478	Staple Unit		Main Warehouse	2.0	000		0.000	0.000	0.000	0.000	420.000	4,		
Select type.				and the second											
	us Dollar 14.00 24	US Dollar tate 14.00 Image: Constraint of the second secon	Normal VIS Dollar P tate 14.00 P International Control Contrectica	Exchange Rate total total total total total total total total Parts SP1919 SP1919 SP1910 Parts SP1919 SP1910 Parts SP1919 SP1910 Parts SP1910 SP1910 Parts Staple Unit Parts Staple Unit Parts Staple Unit	Normery US Dollar Image: Constraint of the second	Normal Solar Exchange Rate 10.00 * 14.00 J J J J J J int QuoteItemType ItemCode QuoteItemDescription WarehouseName Quantit Parts SP1919 SP1919 SP1919 SP1919 SP1919 Main Warehouse 1.1 Parts SP1919 SP1919 SP1919 SP1919 Main Warehouse 2.1 Parts SP1914X Back Toner SP1919 Main Warehouse 2.1 Parts SP19-14X Back Toner SP1919 Main Warehouse 1.1 Parts 1020-478 Staple Unit Main Warehouse 1.1	Normery US Dollar ▼ Exchange Rate 10.00 * 14.00 P <td< th=""><th>Exchange Rate 10.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT Parts SP1919 SP1919 Sp191 Colour MFC Main Warehouse 0 O Parts SP1919 Sp191 Colour MFC Main Warehouse 1.000 O Parts SP1919 Sp191 Colour MFC Main Warehouse 1.000 O Parts SP1919 Sp191 Colour MFC Main Warehouse 1.000 O Parts SP1919 Main Warehouse 1.000 O Parts Black Toner SP1919 Main Warehouse 1.000 O Parts Stapl</th><th>CTRT CTRT CL CTRT CTRT CL CTRT CL CTRT CL CTRT CL CTRT CL CL CL CL CL CL CTRT CL CTRT CL CCL CL CTRT CL CTL CL CTL CTL CTL CTL CTL</th><th>Fachange Rate 10.0 colspan="2" Contract No <th colspan<="" th=""><th>CRT Contractive Contractive Creation of US Dalar view o</th><th>Change Rate Change Rate Contract No Contract No Contract No Contract No PALC Quantity Power No PALC Contract No Parts SP1919 Palma Warehouse Colspan="4">Colspan="4">Parts SP1914 Parts SP1914 <th col<="" th=""><th>CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo Parts SP1919 SP191SprintColour MFC Main Warehouse 0.000 0</th></th></th></th></th></td<>	Exchange Rate 10.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT 14.00 CTRT Parts SP1919 SP1919 Sp191 Colour MFC Main Warehouse 0 O Parts SP1919 Sp191 Colour MFC Main Warehouse 1.000 O Parts SP1919 Sp191 Colour MFC Main Warehouse 1.000 O Parts SP1919 Sp191 Colour MFC Main Warehouse 1.000 O Parts SP1919 Main Warehouse 1.000 O Parts Black Toner SP1919 Main Warehouse 1.000 O Parts Stapl	CTRT CL CTRT CTRT CL CTRT CL CTRT CL CTRT CL CTRT CL CL CL CL CL CL CTRT CL CTRT CL CCL CL CTRT CL CTL CL CTL CTL CTL CTL CTL	Fachange Rate 10.0 colspan="2" Contract No Contract No <th colspan<="" th=""><th>CRT Contractive Contractive Creation of US Dalar view o</th><th>Change Rate Change Rate Contract No Contract No Contract No Contract No PALC Quantity Power No PALC Contract No Parts SP1919 Palma Warehouse Colspan="4">Colspan="4">Parts SP1914 Parts SP1914 <th col<="" th=""><th>CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo Parts SP1919 SP191SprintColour MFC Main Warehouse 0.000 0</th></th></th></th>	<th>CRT Contractive Contractive Creation of US Dalar view o</th> <th>Change Rate Change Rate Contract No Contract No Contract No Contract No PALC Quantity Power No PALC Contract No Parts SP1919 Palma Warehouse Colspan="4">Colspan="4">Parts SP1914 Parts SP1914 <th col<="" th=""><th>CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo Parts SP1919 SP191SprintColour MFC Main Warehouse 0.000 0</th></th></th>	CRT Contractive Contractive Creation of US Dalar view o	Change Rate Change Rate Contract No Contract No Contract No Contract No PALC Quantity Power No PALC Contract No Parts SP1919 Palma Warehouse Colspan="4">Colspan="4">Parts SP1914 Parts SP1914 <th col<="" th=""><th>CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo Parts SP1919 SP191SprintColour MFC Main Warehouse 0.000 0</th></th>	<th>CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo Parts SP1919 SP191SprintColour MFC Main Warehouse 0.000 0</th>	CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo CTRT ContractNo Parts SP1919 SP191SprintColour MFC Main Warehouse 0.000 0

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.



Marina Navigation Process Print Format Current 2 column hander here to group by 3 unit 3 unit Current Current Current QuoteReference CustomerCode CustomerFilame QuoteDescription QuoteReference CustomerCode CustomerFilame QuoteReference Q	umn header he Reference C				order Quo									
B a column header here to group by Image: Column here to group by <th>Reference C</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>Print</th> <th>Forma</th> <th>t d</th> <th>Curre</th> <th>nt</th> <th></th> <th></th> <th></th>	Reference C						Print	Forma	t d	Curre	nt			
QuiteReference CustomerCade CustomerName QuiteDescription QuiteValue Currency ExchangeRate TaskRate QuiteDate SalesmanName Connents QuiteStatus Status 01 02 01 01 02	Reference C													
0: 0:<				QueteDescription	QueteValue	Outropper	EvenageDate	TauData	QueteDate	Calasmanhiamo	Commonte	OusteStatus	Status	1
TA001 Titan Group New Deal Renta 21,208,85 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A 20000023 TIA001 Titan Group Pert Request dn 21,208,85 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A 20000023 TIA001 Titan Group Pert tractinication 5,721,38 ZAR 1.00 14.00 05/08/2014 Beinda Sharm I A 20000032 TIA001 Titan Group Perts not indud 5,721,38 ZAR 1.00 14.00 05/08/2014 Beinda Sharm I A 20000038 TIA001 Titan Group C01 1224 3,498.52 ZAR 1.00 14.00 11/12/2014 Beinda Sharm I A 200000231 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 11/10.00 10/11/12/2014 Beinda Sharm I A 200000238 TIA001 Titan Group tet Confirm delete														
TIA001 Titan Group Part Reguest ch 21,208,86 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A 00000022 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A 0000032 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 05/08/2014 Beinda Sharm I A 20000038 TIA001 Titan Group Perts not includ. 5,721.38 ZAR 1.00 14.00 101/2014 Beinda Sharm I A 20000038 TIA001 Titan Group C01234 3,448.52 ZAR 1.00 11/1001 Beinda Sharm Maine install I A 200000238 TIA001 Titan Group 1234 9,005.38 ZAR 1.00 150.00 02/05/2018 Banca Du Toit N A 20000228 TIA001 Titan Group Confirm delete quote 00 26/06/2018<		-	-	-		-				-		-		
TIA001 Titan Group test 1,154,27 ZAR 1.00 14.00 05/08/2014 Beinds Sharm I A Z10000032 TIA001 Titan Group Perts not indud 5,721.38 ZAR 1.00 14.00 20/08/2014 Beinds Sharm I A Z10000038 TIA001 Titan Group CO1234 3,448.52 ZAR 1.00 14.00 11/12/214 Beinds Sharm Madhine install I A Z10000218 TIA001 Titan Group 1234 9,009.23 ZAR 1.00 15.00 12/20128 Banca Du Toit I A Z10000228 TIA001 Titan Group tet Confirm delete quote 00 26/05/2018 Banca Du Toit N A Z10000238 TIA001 Titan Group tet Confirm delete quote 00 26/05/2018 Banca Du Toit N A Z10001238 Tita01 Titan Group tet Confirm delete this quote? 00 26/05/2018 Banca Du To														
TIA001 Titan Group CO 1234 3,448.52 ZAR 1.00 14.00 11/1/2014 Beinda Sharm Machine Install I A 00000238 TIA001 Titan Group 1234 9,005.28 ZAR 1.00 15.00 02/05/2018 Banca Du Toit I A 0000228 TIA001 Titan Group E Confirm delete quote 00 26/05/2018 Banca Du Toit N A 00000238 TIA001 Titan Group E Confirm delete quote Volume 00 26/05/2018 Banca Du Toit N A 00000238 TIA001 Titan Group E One general context Volume 00 26/05/2018 Banca Du Toit N A 000000000 Titan Group E One you sure you want to delete this quote? Volume Volum Volum Volume	0032 T	TA001	Titan Group				1.00			Belinda Sharm		I		
ZT0000211 TIA001 Titan Group 1234 9,009,28 ZAR 1.00 15.00 02/03/2018 Banca Du Toit I A ZT0000228 TIA001 Titan Group ter Confirm delete quote 00 26/06/2018 Banca Du Toit N A ZT0000238 TIA001 Titan Group ter Confirm delete quote 00 26/06/2018 Banca Du Toit N A Q000238 TIA001 Titan Group ter Confirm delete quote 00 26/06/2018 Banca Du Toit I A Q10000238 TIA001 Titan Group ter Confirm delete quote 00 26/06/2018 Banca Du Toit I A Q10000238 TIA001 Titan Group ter Q1000000000000000000000000000000000000	0034 T	TA001	Titan Group	Parts not includ	5,721.38	ZAR	1.00	14.00	20/08/2014	Belinda Sharm		I	A	
ZT0000228 TIA001 Titan Group ter Confirm delete quote Confirm delete quote N A ZT0000238 TIA001 Titan Group Confirm delete quote X D0 26/06/2018 Banca Du Toit N A Z Are you sure you want to delete this quote? X D0 26/06/2018 Banca Du Toit I A	0038 T	TA001	Titan Group	CO 1234	3,448.52	ZAR	1.00	14.00	11/11/2014	Belinda Sharm	Machine install	I	A	
2 11A001 Ital to doup te 11A001 Ital to doup te 11A001 Ttan Group Ttan Group 11A01 Ttan Group Ttan Group	0211 T	TA001	Titan Group	1234	9,009.28	ZAR	1.00	15.00	02/03/2018	Bianca Du Toit		I	A	
2 1000238 11A01 Inten croup the constraint of th	0228 T	TA001	Titan Group		000 00	340	1.00	00	26/06/2018	Bianca Du Toit		Ν	A	
	0238 T	TA001	Titan Group		te quote			00	26/06/2018	Bianca Du Toit		I	A	
			4	> ? Ar	re you sure yo			17						
		029 1 032 1 034 1 038 1 211 1 228 1	TIA001 332 TIA001 334 TIA001 338 TIA001 211 TIA001 228 TIA001	TIA001 Titan Group 332 TIA001 Titan Group 334 TIA001 Titan Group 338 TIA001 Titan Group 211 TIA001 Titan Group 228 TIA001 Titan Group	229 TIA001 Titan Group Part Request ch 332 TIA001 Titan Group test 333 TIA001 Titan Group Parts not includ 338 TIA001 Titan Group CO 1234 228 TIA001 Titan Group test 238 TIA001 Titan Group test 238 TIA001 Titan Group test	229 TIA001 Titan Group Part Request ch 21,208.86 332 TIA001 Titan Group test 1,154.27 334 TIA001 Titan Group Parts not indud 5,721.38 338 TIA001 Titan Group C0 1234 3,445.52 211 TIA001 Titan Group 1234 9,009.28 228 TIA001 Titan Group test 236.26 238 TIA001 Titan Group test Confirm delete quote	229 TiA001 Titan Group Part Request ch 21,208.86 ZAR 332 TIA001 Titan Group test 1,154.57 ZAR 333 TIA011 Titan Group Parts not includ 5,721.33 ZAR 338 TIA001 Titan Group CO 1234 3,448.52 ZAR 211 TIA001 Titan Group 1234 9,005.38 ZAR 228 TIA001 Titan Group 1234 9,005.38 ZAR 238 TIA001 Titan Group ter Confirm delete quote	229 TIA001 Titan Group Part Request ch 21,208.86 ZAR 1.00 332 TIA001 Titan Group test 1,154.27 ZAR 1.00 333 TIA001 Titan Group Parts not indud 5,721.38 ZAR 1.00 336 TIA001 Titan Group Parts not indud 5,721.38 ZAR 1.00 338 TIA001 Titan Group CO 1234 3,448.52 ZAR 1.00 211 TIA001 Titan Group test 9,005.28 ZAR 1.00 228 TIA001 Titan Group test Confirm delete quote Confirm delete quote	229 TIA001 Titan Group Part Request ch 21, 208.86 ZAR 1.00 14.00 332 TIA001 Titan Group test 1, 154.27 ZAR 1.00 14.00 334 TIA001 Titan Group Pest to notindud. 5, 721.38 ZAR 1.00 14.00 338 TIA001 Titan Group Pest notindud. 5, 721.38 ZAR 1.00 14.00 238 TIA001 Titan Group CO 1234 3, 446.52 ZAR 1.00 14.00 228 TIA001 Titan Group test 9,005.28 ZAR 1.00 15.00 238 TIA001 Titan Group test Confirm delete quote x 00 41 TIA001 Titan Group test Are you sure you want to delete this quote? 00	229 TIA001 Titan Group Part Request ch 21,208.86 ZAR 1.00 14.00 03/07/2014 323 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 03/07/2014 324 TIA0101 Titan Group Part nonIndud 57.21.38 ZAR 1.00 14.00 02/08/2014 328 TIA001 Titan Group Confirm delete quote 14.00 14/00 20/08/2014 228 TIA001 Titan Group test 0.09.82 ZAR 1.00 14.00 11/11/2014 228 TIA001 Titan Group test Confirm delete quote 00 26/06/2018 238 TIA001 Titan Group test On sure you want to delete this quote? 00 26/06/2018	229 TIA001 Titan Group Part Request ch 21,208.86 2AR 1.00 14.00 03/07/2014 Belnda Sharm 323 TIA001 Titan Group test 1,154.27 2AR 1.00 14.00 03/07/2014 Belnda Sharm 324 TIA001 Titan Group Perts not indud 5,721.38 2AR 1.00 14.00 20/08/2014 Belnda Sharm 328 TIA001 Titan Group Perts not indud 5,721.38 2AR 1.00 14.00 20/08/2014 Belnda Sharm 328 TIA001 Titan Group CO 1234 3,446.52 ZAR 1.00 14.00 11/1/2014 Belnda Sharm 211 TIA001 Titan Group tegrad 9,009.28 ZAR 1.00 15.00 26/06/2018 Banca Du Tot 228 TIA001 Titan Group tegrad Confirm delete quote X 00 26/06/2018 Banca Du Tot	229 Titan Group Part Request ch 21,208,86 ZAR 1.00 14,00 03/07/2014 Belinda Sharm 332 TIA001 Titan Group test 1,154.27 ZAR 1.00 14,00 03/07/2014 Belinda Sharm 333 TIA001 Titan Group test 1,154.27 ZAR 1.00 14,00 05/08/2014 Belinda Sharm 334 TIA001 Titan Group Perts not indud. 5,721.38 ZAR 1.00 14,00 20/08/2014 Belinda Sharm 338 TIA001 Titan Group CO 1234 3,448.52 ZAR 1.00 14,00 11/11/2014 Belinda Sharm 211 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15,00 20/07.0218 Banca Du Tot 228 TIA001 Titan Group test Confirm delete quote 20 26/06/2018 Banca Du Tot	229 TIA001 Titan Group Part Request ch 21,208.86 2AR 1.00 14.00 03/07/2014 Beinda Sham I 323 TIA001 Titan Group test 1,154.27 2AR 1.00 14.00 20/08/2014 Beinda Sham I 323 TIA001 Titan Group Perts not indud. 5,721.38 2AR 1.00 14.00 20/08/2014 Beinda Sham I 328 TIA001 Titan Group CO 1234 3,748.52 ZAR 1.00 14.00 20/08/2014 Beinda Sham I 228 TIA001 Titan Group CO 1234 3,748.52 ZAR 1.00 14.00 11/11/2014 Beinda Sham Madhine install I 228 TIA001 Titan Group teg Confirm delete quote 00 26/06/2018 Banca Du Toit N 238 TIA001 Titan Group teg Confirm delete quote 00 26/06/2018 Banca Du Toit I	229 TIA001 Titan Group Part Request ch 21,208.86 ZAR 1.00 14.00 03/07/2014 Belnda Sharm I A 323 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 03/07/2014 Belnda Sharm I A 323 TIA001 Titan Group Pest notindud 5,721.38 ZAR 1.00 14.00 20/08/2014 Belnda Sharm I A 328 TIA001 Titan Group Pest notindud 5,721.38 ZAR 1.00 14.00 20/08/2014 Belnda Sharm I A 328 TIA001 Titan Group CO 1234 3,446.52 ZAR 1.00 14.00 10/11/12014 Belnda Sharm Madme install I A 211 TIA001 Titan Group tz 9,009.28 ZAR 1.00 15.00 20/08/2018 Banca Du Tot N A 228 TIA001 Titan Group tz Confirm delete quote X 00 26/06/2018 Banca Du Tot N A 23 </td

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

VIEW QUOTE

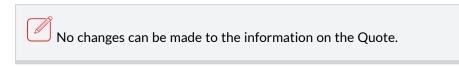
A Quote in any Quote Status can be Viewed.

- 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



٥			-	ales Quotes for Cu										
(Home Home dd Edit D	Equipment / Loo elete View	000		Convert Clon Order Quot			acturing F	Workspaces	Sales Servio	e Reporting	Utilities	_ ć	5 >
	3 Jaintain		Navigation 🔺	Process			rint 🔺	Forma	t "	Curre	nt 🔺			6
	QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	
۴	* II C	18 C	* C	a 🗖 c	=	800	=	=	-	REC	s 🗖 c	8 0 0	s 🛛 C	
	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 install	I	A	
	QT0000211	TIA001	Titan Group	1234	9,009.28	ZAR	1.00	15.00	02/03/2018	Bianca Du Toit		I	Α	
۲	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	

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



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



	P															
Back Save Layo																
DdCk Save Layo	du Print															
Aaint Format	a 5 nt a															<
Customer Name	Titan Group		* Reference	test		•	RefType	Re	eferenceType	Re	eferenceNo					Î
Contact Name				New Quote			ASMN	Ser	rial No							*
	Type Class Comme	rcial	 Date & Time 	-	▼ 12:15:11	-	CALL	Ca	all Reference							
	Bianca Du Toit	(Gai	- *	20/00/2010	• 12.00,11	Ŧ	CASE	Ca	ase							
	South African Rand	4	 Exchange Rate 		1.0	• ‡ •	CTRT	Co	ontract No							
Tax Rate		·	Excitatige Rate		1.0		FNLC	Loc	cation							
Tax Rate							PMNG	Pro	oject Referer	ice						Ŧ
SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription		WarehouseName	Quantity	QuantityP	PerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	e
Suppressoriering			10 C		# C	-	-		R C	-	-	-	-	-	-	
	n 🗖 c	n 🗖 c	- M-													
No	r©: INVN	2020-147K			Main Warehouse	1.00	DO	0.000)	0.000	0.000	0.000	800.000	800.000	15.0	00
10c	-	-				1.00	00	0.000	3	0.000	0.000	0.000	800.000	800.000	15.0	00

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**.

Home	Equipment / Loo	cations Contract Fina	ance / HR Invent	ory Mainte	nance / Pro		turing Pr		Sales Service	Reporting	Utilities		8
dd Edit D	elete View	Forward Accepted	Rejected Convert Order	Clone Quote	Print Ex	port Save Laye	out Worksp	oaces Invo	oiced Quote 🔻	Refresh			
Maintain	4	Navigati 4	Process	4	Print		Format	4	Current	1			
ug a column heade													
QuoteReference		CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	
8 0 0	REC	* D ¢	H C	=	RBC	=	=	=	88C	REC	REC.	8 0 0	
QT0000238	TIA001	Titan Group	Copy of test	920.00	ZAR	1.00	15.00	26/06/2018	Bianca Du Toit		I	A	
OT0000023	DER001	Derton / Technologies	test	21,208.86	ZAR	1.00		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		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	Α	
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	Α	
QT0000195	HOP001	Hope Works (Pty) Ltd	1234	34.20	ZAR	1.00	14.00	30/08/2017	Bianca Du Toit		I	Α	
QT000003	YES001	Young Electric	abc123	16,769.40	ZAR	1.00	14.00	06/05/2014	Karlien Jessic		I	Α	
QT000052	HOP001	Hope Works (Pty) Ltd	test	4,674.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm		I	Α	
QT000066	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	Α	
QT000032	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	Α	
QT0000012	OFF001	Office Supplies Unlimited	OR 14789	950.49	ZAR	1.00	14.00	02/07/2014	Belinda Sharm		I	Α	
QT0000035	DER001	Derton / Technologies	test	285.00	ZAR	1.00	14.00	25/09/2014	Belinda Sharm		I	Α	

BACK NAVIGATION

4. 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.



	Hom	Equipment	/Locations Contract	Finance / HR I	nventory Mainten	ance / Projects	Manufac	turing Prod	curement Sales	Service Re	porting	Utilities	_ 8	>
A	dd Edit	Delete View	Back Forward	Create Create Invoice New Dea	Add Items New I to WO Proje	Deal Save Lay	out Work		int Sales Print Pro Order Invoi		Durban	•	Refresh	
	Main	tain	A Navigation 4	Pi	ocess	4	Format		Print			Current		6
	OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCod	le
۴	8 🖬 C	a 🛛 c	8 0 0	8 🖬 c	REC	=	s 🛛 c	-	A D C	=	=	A C	REC	
	OR0000207	NET001	Networking and Lapto	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:10:42		
	OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10	ZAR	14/08/2017	Bianca Du Toit	1.00	1.00	11:18:17		
	OR0000220	BET0001	Betties Summer Shop	New order	1234	23,029.07	ZAR	21/08/2017	Bianca Du Toit	1.00	14.00	11:49:29		
	OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Bianca Du Toit	1.00	14.00	14:49:36		
	OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Bianca Du Toit	10.00	0.00	02:50:18		
	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26		
	OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30		
۲	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR0000297	NEW 101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca 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		test 1	12,333.75		14/04/2020	Sne Ndwalane	1.00		10:27:06		
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00		14/04/2020	Kame Pillay	10.00		11:59:51		
	OR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
4														

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.



Image: Section 2 Image: Section 2 <th< th=""></th<>
Column header here is group by that colum O Column header here is group by that colum O QueteReference CustomerCode CustomerCode CustomerCode QueteDater SalesmanName Comments QueteStatus Status Q1 Q2
QuoteReference CustomerVame QuoteDescription QuoteValue Currency ExchangeRate TasRate QuoteDate SalesmanName Comments QuoteStatus Status Q1 Q2 Q2<
10. 01. 02. 03. 03. 04. 04.
QT000028 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 03/07/2014 Belinda Sharm I A QT0000032 TIA001 Titan Group test 1,5721.38 ZAR 1.00 14.00 03/07/2014 Belinda Sharm I A QT0000034 TIA001 Titan Group C0 1224 3,485.25 ZAR 1.00 14.00 21/08/2014 Belinda Sharm Machine Install I A QT0000028 TIA001 Titan Group C0 1224 3,485.25 ZAR 1.00 15.00 20/03/2018 Banca Du Toit I A QT0000028 TIA001 Titan Group
QT0000029 TIA001 Titan Group Part Request ch 21,208,86 ZAR 1.00 14.00 03/07/2014 Belinds Sharm I A QT0000032 TIA001 Titan Group test 1,154,27 ZAR 1.00 14.00 05/06/2014 Belinds Sharm I A QT0000034 TIA001 Titan Group Parts not indud 5,721.38 ZAR 1.00 14.00 05/08/2014 Belinds Sharm I A QT0000034 TIA001 Titan Group CO 1234 3,448,52 ZAR 1.00 14.00 20/08/2014 Belinds Sharm Machine install I A QT0000023 TIA001 Titan Group CO 1234 3,448,52 ZAR 1.00 14.00 11/10214 Belinds Sharm Machine install I A QT0000028 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Toit N A QT000028 TIA001
QT0000032 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 05/08/2014 Belinds Sharm I A QT0000034 TIA001 Titan Group Parts not includ. 5,721.38 ZAR 1.00 14.00 05/08/2014 Belinds Sharm I A QT0000038 TIA001 Titan Group C0 1234 3,448.52 ZAR 1.00 14.00 1/11/2014 Belinds Sharm I A QT0000028 TIA001 Titan Group C2 1234 3,448.52 ZAR 1.00 14.00 1/11/2014 Belinds Sharm Machine install A QT0000028 TIA001 Titan Group 1224 9,099.28 ZAR 1.00 14.00 1/11/2014 Belinds Sharm Machine install A QT0000028 TIA001 Titan Group 1234 9,099.28 ZAR 1.00 15.00 02/03/2018 Binaca Du Toit N A QT0000228 TIA001 Titan Group Input Validation<
QT0000034 TIA001 Titan Group Parts not indud 5,721.38 ZAR 1.00 14.00 20,08,2014 Belinds Sharm I A QT0000038 TIA001 Titan Group C01224 3,445.52 ZAR 1.00 14.00 11/1/2014 Belinds Sharm I A QT0000218 TIA001 Titan Group C01224 9,009.28 ZAR 1.00 14.00 11/1/2014 Belinds Sharm I A QT0000218 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bitanca Du Toit I A QT0000228 TIA001 Titan Group Input Validation Jita Bitanca Du Toit N A QT0000228 TIA001 Titan Group Input Validation Jita Bitanca Du Toit N A
QT0000038 TIA001 Titan Group CO 1234 3,448.52 ZAR 1.00 14.00 11/11/2014 Belinds Sharm. Machine Install I A QT0000028 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Toit I A QT0000228 TIA001 Titan Group Input Validation V 15.00 02/03/2018 Bianca Du Toit N A QT0000238 TIA001 Titan Group Input Validation V 18 Bianca Du Toit N A
QT0000211 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Teit I A QT0000228 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Teit I A QT0000238 TIA001 Titan Group Input Validation X D18 Bianca Du Teit N A D18 Bianca Du Teit I A D18 Bianca Du Teit I A
QT0000228 TIA001 Titan Group Input Validation X D18 Banca Du Toit N A QT0000228 TIA001 Titan Group Input Validation X D18 Banca Du Toit N A
QT0000238 TIA001 Titan Group Input Valuation 018 Bianca Du Toit I A
Accepted? Accepted? Accepted? Yes No

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.

Mantani Navgation Process Print Format Current QuoteSteference CustomerName QuoteStatus Status QuoteSteference CustomerName QuoteStatus Status QuoteSteference CustomerName QuoteStatus Status QuoteSteference CustomerName QuoteStatus Status QuoteStatus Titan Group New Deal Renta. 21,208.86 2AR 1.00 14.00 03/07/2014 Beinds Sharm I A QT0000028 TIA001 Titan Group Pert Request ch 21,208.86 2AR 1.00 14.00 03/07/2014 Beinds Sharm I A QT0000029 TIA001 Titan Group Perts not nobud. 5,721.38 2AR 1.00 14.00 03/07/2014 Beinds Sharm I A QT0000028 TIA001 Titan Group Perts not nobud. 5,721.38 2AR 1.00 14.00 03/07/2018 Beinds Sharm I A QT0000028 TIA001 Titan Group D124 3,445.52 2AR 1.00 15.00 <th>Home Home Add Edit Del</th> <th>Equipment / Lo Equipment / Lo Equipment / Lo</th> <th>Back Forward Acce</th> <th>epted Rejected</th> <th>oventory M Convert Clon Order Quo</th> <th>te</th> <th>Export Sa</th> <th>Ianufacturing</th> <th>Workspaces</th> <th>Durban</th> <th>• Refresh</th> <th>porting Util</th> <th>ities —</th> <th>8.3</th>	Home Home Add Edit Del	Equipment / Lo Equipment / Lo Equipment / Lo	Back Forward Acce	epted Rejected	oventory M Convert Clon Order Quo	te	Export Sa	Ianufacturing	Workspaces	Durban	• Refresh	porting Util	ities —	8.3
QuoteReference CustomerCode CustomerLame QuoteDescription QuoteDescription CustomerLame QuoteDescription CustomerLame QuoteDescription CustomerLame QuoteDescription CustomerLame QuoteDescription CustomerLame QuoteDescription QuoteDescription CustomerLame QuoteDescription QuoteDescription<	Maintain	4	Navigation	Process			Print 💷	Forma	t	Curre	nt "			6
10: 10: <th></th> <th>1</th>														1
QT000028 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 Pert Request ch 21,208.86 ZAR 1.00 14.00 03/07/2014 Belinda Sharm I A QT0000032 TIA001 Titan Group Pert Request ch 21,208.86 ZAR 1.00 14.00 03/07/2014 Belinda Sharm I A QT0000032 TIA001 Titan Group Perts not Indud 5,721.38 ZAR 1.00 14.00 03/07/2014 Belinda Sharm I A QT0000038 TIA001 Titan Group C0 1234 3,448.52 ZAR 1.00 14.00 01/11/12/014 Belinda Sharm I A QT0000238 TIA001 Titan Group 1224 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Tot A A QT0000238 TIA001 Titan Group I	-			-			-		-					
QT000029 TIA001 Titan Group Part Request ch 21,208.86 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A QT0000020 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A QT0000034 TIA001 Titan Group Part shot includ 5,721.38 ZAR 1.00 14.00 03/07/2014 Beinda Sharm I A QT0000034 TIA001 Titan Group CO 1234 3,448.52 ZAR 1.00 14.00 11/1/2014 Beinda Sharm Machine install I A QT000028 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Toit I A QT000028 TIA001 Titan Group 1234 9,009.28 ZAR 1.00 15.00 02/03/2018 Bianca Du Toit I A QT0000228 TIA001 Titan Group Input Va	-	-	-	-		-				-		-	-	
QT000032 TIA001 Titan Group test 1,154.27 ZAR 1.00 14.00 05/08/2014 Belnda Sharm I A QT0000034 TIA001 Titan Group Parts not indud 5,721.38 ZAR 1.00 14.00 20/08/2014 Belnda Sharm I A QT0000038 TIA001 Titan Group CO 1234 3,448.52 ZAR 1.00 14.00 19/08/2014 Belnda Sharm I A QT0000238 TIA001 Titan Group 1.234 9,099.28 ZAR 1.00 15.00 02/08/2018 Bennca Du Tot A QT0000228 TIA001 Titan Group 1.234 9,099.28 ZAR 1.00 15.00 02/08/2018 Bennca Du Tot A A QT0000228 TIA001 Titan Group Input Validation X 2018 Banca Du Tot I A QT0000228 TIA001 Titan Group Are you sure you want to update this quote, no. QT0000228 for Z18 Benca Du Tot I <												T		
QT0000034 Titan Group Parts not includ 5,721.38 ZAR 1.00 14.00 20/08/2014 Beinda Sharm I A QT0000038 TIA001 Titan Group CO 1234 3,446.52 2AR 1.00 14.00 11/11/2014 Beinda Sharm I A QT0000238 TIA001 Titan Group L224 9,009.28 2AR 1.00 15.00 02/03/2018 Banca Du Toti I A QT0000238 TIA001 Titan Group Input Validation 2018 Banca Du Toti A A QT0000238 TIA001 Titan Group Par you sure you want to update this quote, no. QT0000228 for Answer Yes' to mark it as Rejected. 2018 Banca Du Toti 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 Input Validation 2018 Bianca Du Toit A A QT0000228 TIA001 Titan Group Input Validation 2018 Bianca Du Toit A A QT0000228 TIA001 Titan Group Input Validation 2018 Bianca Du Toit I A QT0000228 TIA001 Titan Group Input Validation 2018 Bianca Du Toit I A QT0000228 TIA001 Titan Group to be Rejected? Are you sure you want to update this quote, no. QT0000228 for customer Titan Group to be Rejected? Answer Yes' to mark it as Rejected. Inswer Yes' to mark it as Rejected? Inswer Yes' to mark it as Rejected. Inswer Yes' to ma												I		
QT0000228 TIA001 Titan Group Input Validation 2018 Bianca Du Toit A A QT0000238 TIA001 Titan Group Input Validation 2018 Bianca Du Toit A A QT0000238 TIA001 Titan Group Input Validation 2018 Bianca Du Toit A A QT0000228 TIA001 Titan Group Are you sure you want to update this quote, no. QT0000228 for Answer 'Yes' to mark it as Rejected! Answer 'Yes' to mark it as Rejected! A	QT0000038	TIA001	Titan Group	CO 1234	3,448.52	ZAR	1.00	14.00	11/11/2014	Belinda Sharm	Machine install	I	A	
QT0000238 TIA001 Titan Group Imput Valuation Q Are you sure you want to update this quote, no. QT0000228 for Answer Yes' to mark it as Rejected?	QT0000211	TIA001	Titan Group	1234	9,009.28	ZAR	1.00	15.00	02/03/2018	Bianca Du Toit		I	A	
2018 Bianca Du Teit I A	QT0000228	TIA001	Titan Group	t Validation					2018	Bianca Du Toit		A	A	
Customer Than Group to be Rejected? Answer Yes' to mark it as Rejected.	QT0000238	TIA001		e validation					2018	Bianca Du Toit		I	A	
	2		•	🕑 customer Ti	tan Group to	be Rejecter	d?							

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.

1		elete View			Convert Clon Order Quot	e		ve Layout	+	Durban	Refresh		
	g a column heade	-	Navigation a	Process			Print 🔺	Forma	t	Currer		/	
	QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
ę	n 🛛 c	* 0 ¢	* D ¢	n 🛛 c	=	R B C	-	-	=	n 🛛 c	# 0 0	# 0 0	8 0 0
-	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
	QT000083	BOT0001	Bothas Networking inc	test forex with t	133.87	USD	10.00	14.00	25/10/2016	Bianca Du Toit		I	A
1	QT0000096	BOT0001	Bothas Networking inc		525.66	USD	10.00	14.00	10/11/2016	Bianca Du Toit	Test	N	A
1	QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	A
1	QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00	14.00	11/11/2016	Bianca Du Toit		I	A
t	QT0000100	BOT0001	Bothas Networking in	rder Generation <			4		×	Judith Mudzengi		N	A
۲	QT0000160	BOT0001	Bothas Networking inc	ruer ceneration		100			· · · ·	Bianca Du Toit		N	A
	QT0000163	BOT0001	Bothas Networking inc		1."	-	Bianca Du Toit		I	A			
	QT0000169	BOT0001	Bothas Networking inc		tworking inc		Bianca Du Toit		N	A			
	QT0000170	BOT0001	Bothas Networking inc	bothasive	tworking inc	to an orac	Bianca Du Toit		N	A			
	QT0000172	BOT0001	Bothas Networking inc						7	Bianca Du Toit		N	A
	QT0000177	BOT0001	Bothas Networking inc	5			Yes	N	D	Bianca Du Toit	USD, 14, 10, I	N	A
	QT0000190	BOT0001	Bothas Networking inc				-	_		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

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.



Maint	ain "a	Navigation 🔺	Process		- F	Print 4	Forma	it 4	Curret	nt 4		
QuoteReference	e CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
n 🗖 c	R C	* D :	ADC .	-	n 🖬 c	-	-	-	R O C	All C	n 🛛 c	R B C
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
QT000083	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	Α
QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00	14.00	11/11/2016	Bianca Du Toit		I	A
QT0000100	BOT0001	Bothas Networking Order	Generation 🚤					×	Judith Mudzengi		N	Α
QT0000160	BOT0001	Bothas Networking			'				Bianca Du Toit		N	Α
QT0000163	BOT0001	Bothas Networking		4-					Bianca Du Toit		I	Α
QT0000169	BOT0001	Bothas Networking		to close the q n this quote if		00160 off? No fi	urther orders	s will be	Bianca Du Toit		N	Α
QT0000170	BOT0001	Bothas Networking	possible from	rens quote n					Bianca Du Toit		N	Α
QT0000172	BOT0001	Bothas Networking							Bianca Du Toit		N	Α
QT0000177	BOT0001	Bothas Networking	7—			Yes		No	Bianca Du Toit	USD, 14, 10, I	N	Α
QT0000190	BOT0001	Bothas Networking						_	Bianca Du Toit		N	Α
QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	Α
QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A

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.



	Malakala		ManufaceNew		Order Quot		No.		*	0.000			
-	Maintain	-	Navigation 4	Process		2	Print 🔺	Forma	ы. л	Curre	nt 4		
	ag a column heade	CustomerCode		OuoteDescription	OuoteValue	0	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	OuoteStatus	Chabus
ę	Quotekererence	CustomerCode	n Customerivame	QuoteDescription	Quotevalue	REC	ExchangeRate	Taxkate	QuoteDate	salesmanivame	Comments	Quotestatus	status
	OT0000011	BOT0001	Bothas Networking inc	OR 147	17,908.76	-	1.00		02/07/2014	Belinda Sharm	-w-	I	A
	QT0000011 OT0000018	BOT0001 BOT0001	Bothas Networking inc	test	74,999.88		1.00		02/07/2014	Belinda Sharm		I	A
	QT0000083	BOT0001	Bothas Networking inc	test forex with t			10.00		25/10/2016	Bianca Du Toit		I	A
	QT0000096	BOT0001	Bothas Networking inc	counter march	525.66		10.00		10/11/2016	Bianca Du Toit	Test	N	A
	QT0000097	BOT0001	Bothas Networking inc	test	60.01		10.00		10/11/2016	Bianca Du Toit		N	A
	QT0000098	BOT0001	Bothas Networking inc		337.17		10.00		11/11/2016	Bianca Du Toit		I	A
	OT0000100	BOT0001	Bothas Networking inc						/2017	Judith Mudzengi		N	A
•	QT0000160	BOT0001	Bothas Networking inc	Order Generati	on 🚽		8		/2017	Bianca Du Toit		N	A
	QT0000163	BOT0001	Bothas Networking inc			1.1	/		/2017	Bianca Du Toit		I	A
	QT0000169	BOT0001	Bothas Networking inc		ou wish to vie	w the ord	er created, no. C	R0000315?	/2017	Bianca Du Toit		N	A
	QT0000170	BOT0001	Bothas Networking inc						/2017	Bianca Du Toit		N	A
	QT0000172	BOT0001	Bothas Networking inc						/2017	Bianca Du Toit		N	Α
	QT0000177	BOT0001	Bothas Networking inc	0-			Yes	No	/2017	Bianca Du Toit	USD, 14, 10, I	N	A
	QT0000190	BOT0001	Bothas Networking inc						/2017	Bianca Du Toit		N	Α
	QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	Α
	QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A

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

-	Hom	e Equipment /	Locations Contract	Finance / HR I	Add Items New I	Deal Save Lay	Manufac o rout Work	ispaces Pr	curement Sales	forma Export	porting Durban	Utilitie (>)	Refresh	
	Main	tain	A Navigation	Pr	ocess	4	Format	4	Print	4		Current	4	6
	OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCo	de
P	R D C	A D C	REC	* 0 4	A C	-	n C	-	A D C	-	-	H B C	H B C	
	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		
	OR0000297	NEW 101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca 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	MRTEst	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	Bianca Du Toit	10.00	14.00	16:53:27		
1	OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		

Help v2024.5.0.7/1.0 - Pg 16 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential



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.

-		elete View			Convert Clone Order Quot			ve Layout	÷	Durban	• Refresh		
-	Maintain	-	Navigation 🔺	Process		4	Print 3	Forma	<u>к</u> 3	Currer	nt "		//
	ag a column heade				-	_					-		
•		CustomerCode	soc	QuoteDescription	QuoteValue	Eurrency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
	QT0000011	BOT0001	Bothas Networking inc	OR 147	17,908.76	-	1.00		02/07/2014	Belinda Sharm	-B-	T.	A
	QT0000011 OT0000018	BOT0001 BOT0001	Bothas Networking Inc	test	74,999.88		1.00		02/07/2014	Belinda Sharm		T	A
	QT0000018 QT0000083	BOT0001	Bothas Networking inc	test forex with t	133.87		10.00		25/10/2016	Bianca Du Toit		I	A
	QT0000096	BOT0001	Bothas Networking inc		525.66		10.00		10/11/2016	Bianca Du Toit	Test	N	A
	OT0000097	BOT0001	Bothas Networking inc	test	60.01		10.00		10/11/2016	Bianca Du Toit		N	A
	QT0000098	BOT0001	Bothas Networking inc		337.17	USD	10.00		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
1	QT0000163	BOT0001	Bothas Networking inc	test	71.25	USD	10.00	0.00	07/08/2017	Bianca Du Toit		I	A
	QT0000169	BOT0001 2	Bothas Networking inc	test	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 <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 any **Item details**, if required.
- 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.

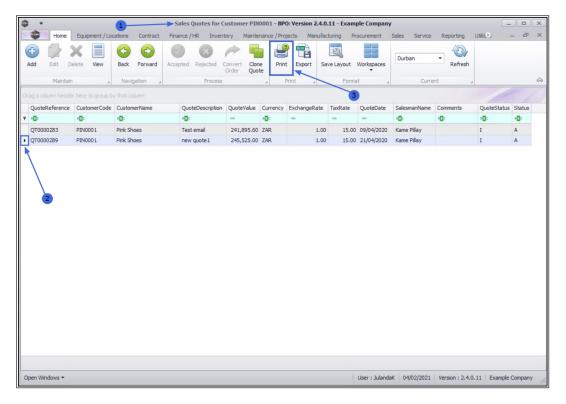
\$	Ŧ		4	Add new Customer Que	ote - BPO: Version	2.4.0.11 - E	Example Compar	Y					
	Home	Equipment / Locatio	ns Contrac	ct Finance / HR Inventory Mai	ntenance / Projects	Manufact	uring Procurem	ent Sales	Service	Reporting	Utilitiæ	- 6	P X
	Те	Ny Sales Apply Promplate Methodo		Save Layout Print	5		6						\$
	Customer Name	Bothas Networking	inc	P * Reference			RefType R	eferenceType	R	eferenceNo			
	Contact Name			> * Status New Quote		- *	WKOR V	/ork Order Ref	ference				Î
	Commercial	USD Price by Item		Date & Time 03/02/2021	· 12:11:52	:		ales Quote				_	
	Salesman	Bianca Du Toit						erial No				_	
	Currency	US Dollar		▼ Exchange Rate	10.0	0 🛊 *		all Reference				_	
	Tax Rate	0.00		Q				ontract No roiect Referen				_	
ł	SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	Bas
ę		=	REC	8 0 0	REC	=	=	8 0 0	=	=	=	=	=
		Parts	2020-147Y	Yellow toner SP2020	Main Warehouse	1.000	0.00	0	413.62	0.000	0.000	6.613	
		Labour	CON	Consulting		1.000	0.00	0	434.000	0.000	0.000	5.500	
_		Expenses	TOLL	Toll		1.000	0.00	0	0.000	0.000	0.000	0.000	
		Travel	55	Travel not exceeding 50 km		1.000	0.00	0	0.000	0.000	0.000	17.500	
		Sub Contracts	INST	Installation Fee		1.000	0.00	0	350.000	0.000	0.000	9.000	
		Internal Service	CALL	Call Out Fee		1.000	0.00	0	250.000	0.000	0.000	8.000	
_		Warranty	24MSW	24 Month Supplier Warranty		1.000	0.00	0	0.000	0.000	0.000	0.000	
*		Select type											
4					7								•
	Comment				-				Sub Tot	al		46.	.61
									VA	л		0.	.00
					Ψ.				Grand Tot	al		46.	.61
0	en Windows 🔻						User :	JulandaK 0	3/02/2021	Version : 2	4.0.11 E	ample Compa	ny

For a detailed review of this procedure click on the link to redirect to <u>Quotes</u> - <u>Clone a Quote</u>.



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.



-	Ŧ			Sal	es Quotes for Ci	ustomer PIN	0001 - BP(): Version 2.4.0	.11 - Exam	ple Company	1		-		X
Ē	Home	Equipment / Loc	ations Contract	Finan	ce / HR Invent	tory Mainte	nance / Proj	jects Manufac	cturing Pr	ocurement	Sales Service	Reporting	Utilite	- 8	x
(elete View	Back Forward	Accept		Convert Clon Order Quot	te		ave Layout	•	Durban	• Refresh			
_	Maintain		Navigation 🖌		Process		, F	Print "	Forma	at "	Curre	nt			6
	QuoteReference	CustomerCode	CustomerName	(QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName		QuoteStatus	Status	
٩	8 C	s 🛛 c	n 🗖 c		R 🖥 C	-	a∎c	-	-	-	R C	REC	H 🖬 C	1 0 0	
	QT0000283	PIN0001	Pink Shoes		Test email	241,895.60		1.00		09/04/2020	Kame Pillay		I	A	
۲	QT0000289	PIN0001	Pink Shoes	r	new quote1	245,525.00	ZAR	1.00	15.00	21/04/2020	Kame Pillay		I	Α	
			9		Ов	rint Quote mail Quote rint and Email (Quote		A matrix						

- 7. The Sales Quote will display in the **Preview** screen.
- 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.





MNU.061.033

Help v2024.5.0.7/1.0 - Pg 21 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential