

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

SALES

QUOTES - APPLY SALES TEMPLATE

Sales Templates can be set up for **bundles** or **sets** that are usually sold

together.

For example:

- A machine model plus
 - its standard accessories,
 - toners
 - and service charges.

This template can then be used when creating a new **Sales Quote**. The quote can be amended, where required, for instance the **item quantities** can be updated.

Unit costs are updated on the **Sales Quote** when applied, and the selling price is calculated based on the unit cost of the item. The selling price can also be amended on the Quote.

One or multiple Sales Templates can be applied to a Quote.

Multiple Sales Templates and Project Methodologies can be applied to the same Sales Quote.

A Sales Template can be applied when a Quote is created, or when Editing a Quote. For the purpose of this manual, a Sales Template will be applied while creating a New Quote.



Ribbon Access: Sales > Quotes



- 1. The **Sales Quotes** listing screen will display.
- 2. Select the **Site** you wish to work in.
 - The example has **Durban** selected.

ADD QUOTE

3. Click on **Add**.

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

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	QT0000192	SAM001	Samanthas Diner	test	376.06	USD	11.00	0.00	15/08/2017	Bianca Du Toit	test	Ν	A
	QT0000232	HOP001	Hope Works (Pty) Ltd	Option2	10,681.20	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		Ν	A
	QT0000278	BEA001	Bearing and Shoe	12345	9,292.54	ZAR	1.00	15.00	27/08/2019	Bianca Du Toit		Ν	Α
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	QT0000169	BOT0001	Bothas Networking inc	test	66.12	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	Α
	QT0000181	HOP001	Hope Works (Pty) Ltd	TEST	427.50	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit	test	Ν	Α
	QT0000158	DER001	Derton / Technologies	test	3,246.72	ZAR	1.00	14.00	07/08/2017	Bianca Du Toit		Ν	Α
	QT0000109	HOP001	Hope Works (Pty) Ltd	test quote with	1,714.56	USD	10.00	14.00	02/03/2017	Judith Mudzengi		Ν	A
	QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		Ν	A
	QT0000244	HOP001	Hope Works (Pty) Ltd	1234	17,302.29	ZAR	1.00	15.00	06/11/2018	Bianca Du Toit	Some Notes	Ν	Α
	QT0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242,921.94	ZAR	1.00	15.00	10/07/2020	Bianca Du Toit	Text	Ν	Α
	QT0000146	DER001	Derton / Technologies	7412	984.96	ZAR	1.00	1.00	29/05/2017	Bianca Du Toit		Ν	Α
	QT0000152	HOP001	Hope Works (Pty) Ltd	cal qoute retest	2,672.16	ZAR	1.00	1.00	04/07/2017	Judith Mudzengi		Ν	Α
	QT0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A
	QT0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	Α
	QT0000189	OFF001	Office Supplies Unlimited	test	5,553.93	ZAR	1.00	14.00	15/08/2017	Bianca Du Toit	test	Ν	Α
	QT0000118	HOP001	Hope Works (Pty) Ltd	discount comme	17,344.14	ZAR	1.00	14.00	13/04/2017	Judith Mudzengi		Ν	Α
	QT0000264	HOP001	Hope Works (Pty) Ltd	test	8,625.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		Ν	Α
	QT0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		Ν	Α
	QT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/2020	Bianca Du Toit		N	A
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QUOTE HEADER

4. The Add new Customer Quote screen will display.

Complete the **Customer Heading**, the **Financial Heading** and **Cross Reference Information**. For a detailed handling of this topic refer to Quotes - Add Sales Quote.

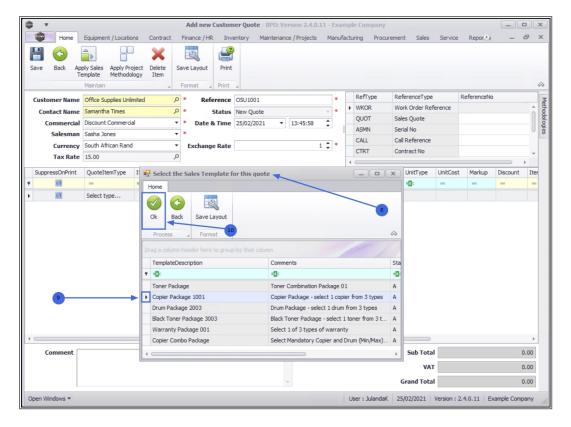
APPLY SALES TEMPLATE

- 5. Click Apply Sales Template.
- 6. When you receive the Input Validation message confirming;
 - Are you sure you want to select a sales template? The items will be appended to the existing items.
- 7. Click on Yes.

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- 8. The Select the Sales Template for this quote screen will display.
- 9. Click on the **row** of the **Sales Template** you wish to apply.
- 10. Click on OK.



QUOTE ITEMS DATA GRID

- 11. The **Items** data grid is populated with the items already set up from the Sales Template selected.
 - Ensure that all the **selling prices** have been completed.
 - You can add more than one Sales Template to the quote.
 - Individual Quote items can be added or deleted. Click on the link if you need assistance on how to Quotes - Add Sales Quote or on how to Quotes Edit Sales Quote.
 - Use the "View Stock" on page 9 feature to ensure that the items you wish to include on the Quote, are available.



SAVE SALES QUOTE

12. When you have completed all the relevant information for the quote, click on **Save**.

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- 13. You will return to the Sales Quotes listing screen.
- 14. The New Quote can now be viewed in the **New Quote Status**.



Quotes - Apply Sales Template

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T	QT0000321	OFF001	Office Supplies Un		1001	8,838,90	ZAR		1.00	15.00	25/02/2021	Sasha Jones	Full installation.	N	A		
- 4	QT0000178	PAN001	Panda Copiers		1, 10, ITEM	270.04		-	10.00		10/08/2017			N	A		
	OT0000129	HOP001	Hope Works (Pty)		Qoute tes	14,903.82	ZAR		1.00		25/05/2017			N	A		
1		HOP001	Hope Works (Pty)	Ltd test	-	2,210.59	ZAR		1.00	1.00	28/07/2017	Bianca Du Toit		N	A		
	2T0000086	APP0001	Apple Juice Inc	iouy	ikj	8,347.60	ZAR		1.00	14.00	01/11/2016	Belinda Sharm		N	A		
	QT0000135	HOP001	Hope Works (Pty)	Ltd Call	Quote v2	493.62	ZAR		1.00	1.00	25/05/2017	Judith Mudzengi		N	A		
	QT0000112	HOP001	Hope Works (Pty)	Ltd 5468	99732	4,617.00	ZAR		1.00	14.00	17/03/2017	Judith Mudzengi		N	A		
	QT0000292	BIG0001	Big Bargains	ABO	_SalesStudio	241,500.00	ZAR		1.00	15.00	27/05/2020	Abigail Milne		N	A		
	QT0000298	HOP001	Hope Works (Pty)	Ltd AB0	4	15,392.35	ZAR		1.00	15.00	03/06/2020	Bianca Du Toit	Quote doned,	. N	Α		
	QT0000149	HOP001	Hope Works (Pty)	Ltd Rete	st 2	6,156.00	ZAR		1.00	1.00	19/06/2017	Judith Mudzengi		N	Α		
	QT0000190	BOT0001	Bothas Networking	g inc		533.63	USD		10.00	0.00	15/08/2017	Bianca Du Toit		N	Α		
	QT0000236	APP0001	Apple Juice Inc	1234		1,035.00	ZAR		1.00	15.00	27/06/2018	Bianca Du Toit		N	Α		
	QT0000113	HOP001	Hope Works (Pty)	Ltd qote	13	6,156.00	ZAR		1.00	14.00	04/04/2017	Bianca Du Toit		N	Α		
	QT0000184	OFF001	Office Supplies Un	nlimited bpo2	credit not	196.65	ZAR		1.00	1.00	10/08/2017	Bianca Du Toit		N	Α		
	QT0000267	HOP001	Hope Works (Pty)	Ltd test	multi level p	8,625.00	ZAR		1.00	15.00	26/07/2019	Bianca Du Toit		N	Α		
	QT0000230	APP0001	Apple Juice Inc	Copy	of New 123	4,597.20	ZAR		1.00	15.00	21/09/2016	Bianca Du Toit	Test custom r	Ν	Α		
	QT0000067	DER001	Derton / Technolo	igies test		570.00	ZAR		1.00	14.00	23/11/2015	Belinda Sharm		Ν	Α		
	QT0000313	BIT001	Bits and Bytes	Clon	Quote-AB02	17,677.10	ZAR		1.00	15.00	15/07/2020	Abigail Milne	AB02 quote d	Ν	Α		
	QT0000276	BOT0001	Bothas Networking	g inc test		4,377.75	USD		10.00	0.00	30/07/2019	Bianca Du Toit		N	Α		
	QT0000121	HOP001	Hope Works (Pty)	Ltd test		22,852.44	ZAR		1.00		20/04/2017			Ν	Α		
	QT0000127	HOP001	Hope Works (Pty)	Ltd com	nercial test	834.20	ZAR		1.00	1.00	10/05/2017	Judith Mudzengi		N	Α		
	QT0000319	ABCXYZ123	ABC SHoe Co		ttttttt	3,000.00	ZAR		1.00	0.00	19/10/2020	Abigail Milne		N	Α		
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