

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

# SALES STUDIO CONFIGURATION

## EDIT QUOTE DEFAULT ITEMS

(from the 'Quote Default Items' screen)

Default items are items that are set up to be added to all new quotes.

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

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

There are 2 ways to edit these default items:

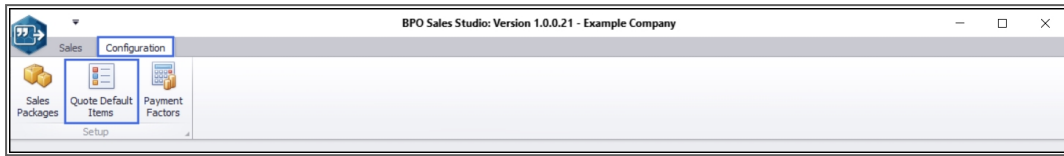
- i. From the 'Quote Default Items' screen, where only the Quantity can be edited.
- ii. From the 'Add' or 'Edit Customer Quote' screens where you can edit the Quote Item Description, Quantity, Discount and Item Price.

The following process will set out (i) - how to **edit** a quote default item from the **Quote Default Items** screen.

### Version Compatibility

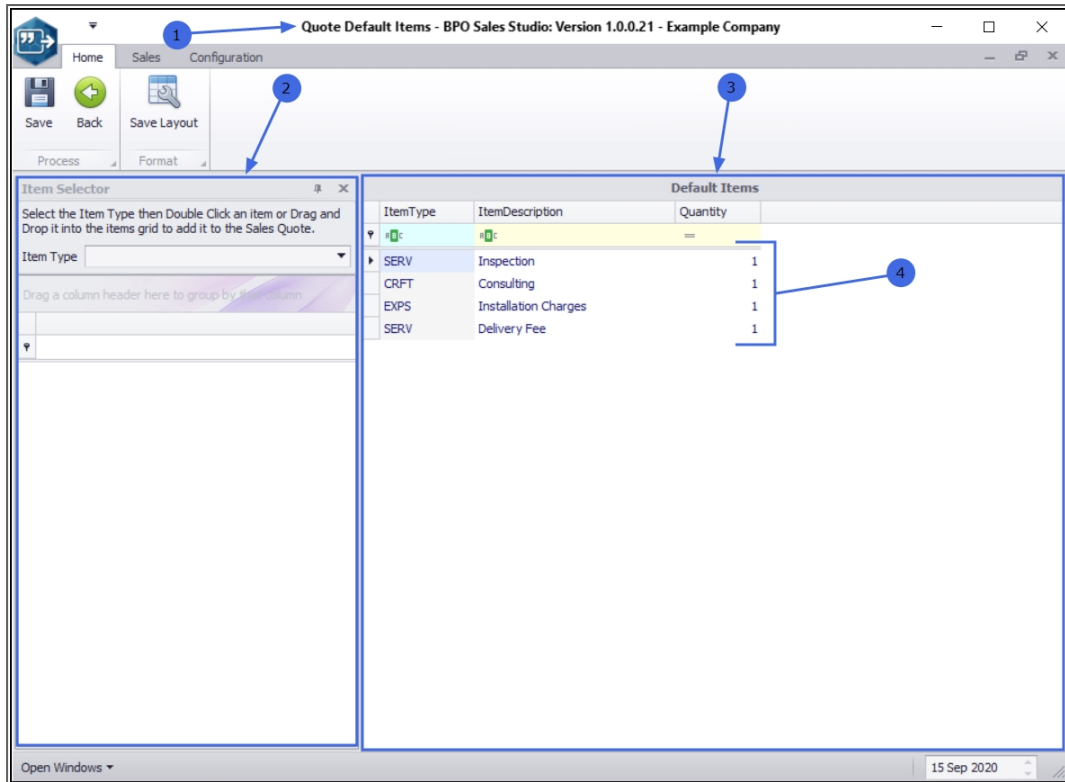
- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

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



## THE 'QUOTE DEFAULT ITEMS' SCREEN

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



## SELECT ITEM TO BE EDITED

1. Click in the **Quantity** column of the Item that you wish to edit.
2. Directional **arrows** will appear.
3. Either **type** directly in the field, or use these **arrows** to update the number.

Quote Default Items - BPO Sales Studio: Version 1.0.0.21 - Example Company

Home Sales Configuration

Save Back Save Layout

Process Format

Item Selector

Select the Item Type then Double Click an item or Drag and Drop it into the items grid to add it to the Sales Quote.

Item Type Internal service

Drag a column header here to group by that column

ItemCode	ItemDescription	Type	Class	Rate	Units	TaxType	TaxC
CALL	Call Out Fee	INT	SER	100.00	ea	VAT	1
INST	Installation Fee	INT	SER	350.00	ea	VAT	1
DEA	Dealer Service Fee	EXT	SER	350.00	ea	VAT	1
SET	Settlements	INT	SER	500.00	ea	VAT	1
TOLL	Toll Fee	EXT	SER	250.00	ea	VAT	1A
STCD	Short Term Contract Deposit	EXT	SER	10.00	ea	VAT	1
MYS	Meter Yield Short Fall	INT	SER	500.00	ea	VAT	1
LTCD	Long Term Contract Deposit	INT	SER	250.00	ea	VAT	1
LTC	LTC	INT	SER	250.00	ea	VAT	1
CLA	Cleaning Fee	INT	SER	500.00	ea	VAT	1
DES	Design consultation	INT	SER	450.00	ea	VAT	1
PRI	Printing	INT	SER	350.00	ea	VAT	1
TEST	Test Service	INT	SER	250.00	ea	VAT	1
Retest	Retest	INT	SER	150.00	ea	VAT	1

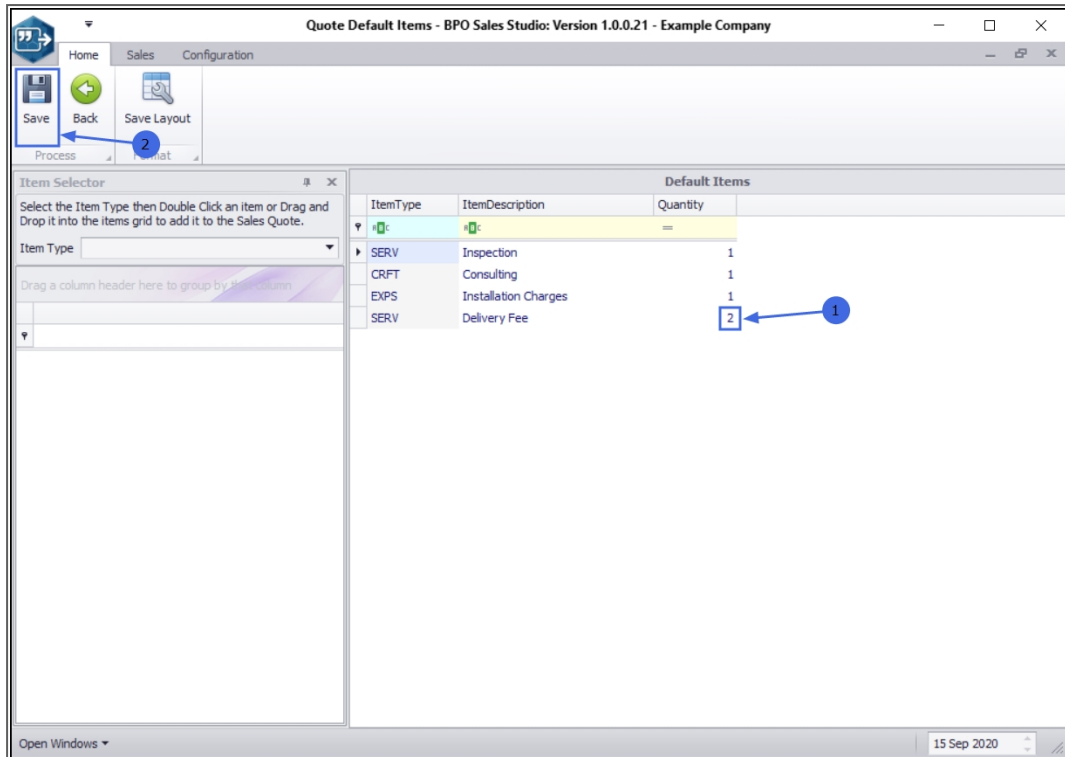
Default Items

ItemType	ItemDescription	Quantity
SERV	Inspection	1
CRFT	Consulting	1
EXPS	Installation Charges	1
SERV	Delivery Fee	1

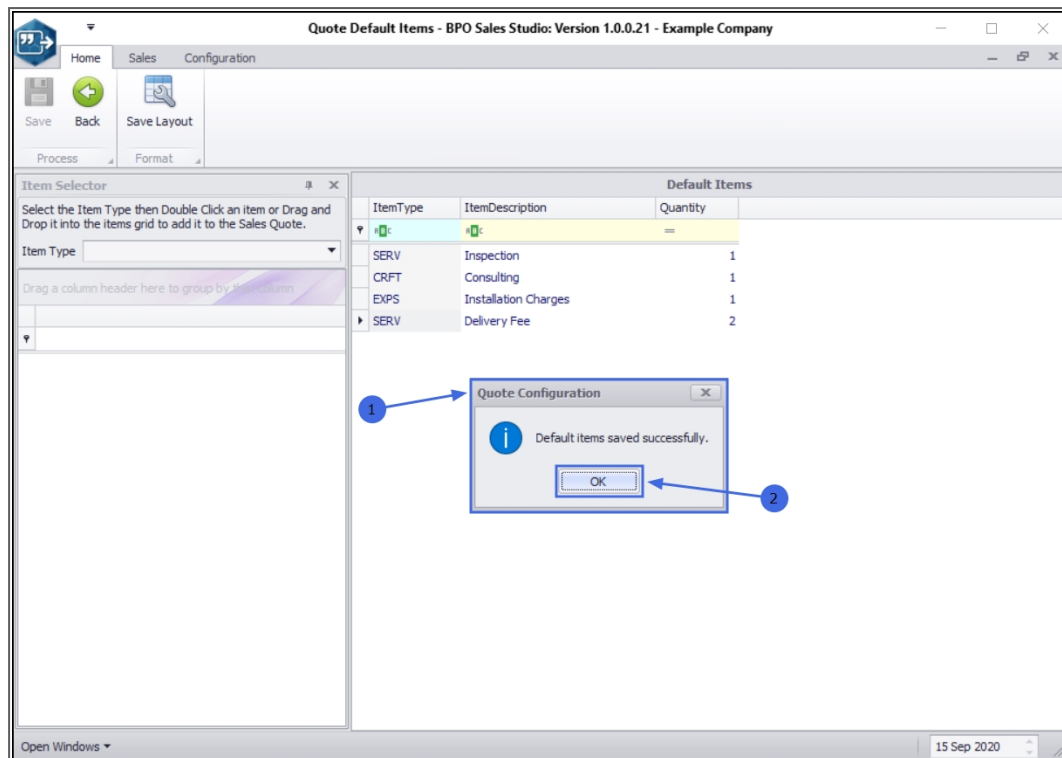
15 Sep 2020

## SAVE EDITED DETAILS

1. When you have finished editing the Item quantity,
2. Click on **Save**.

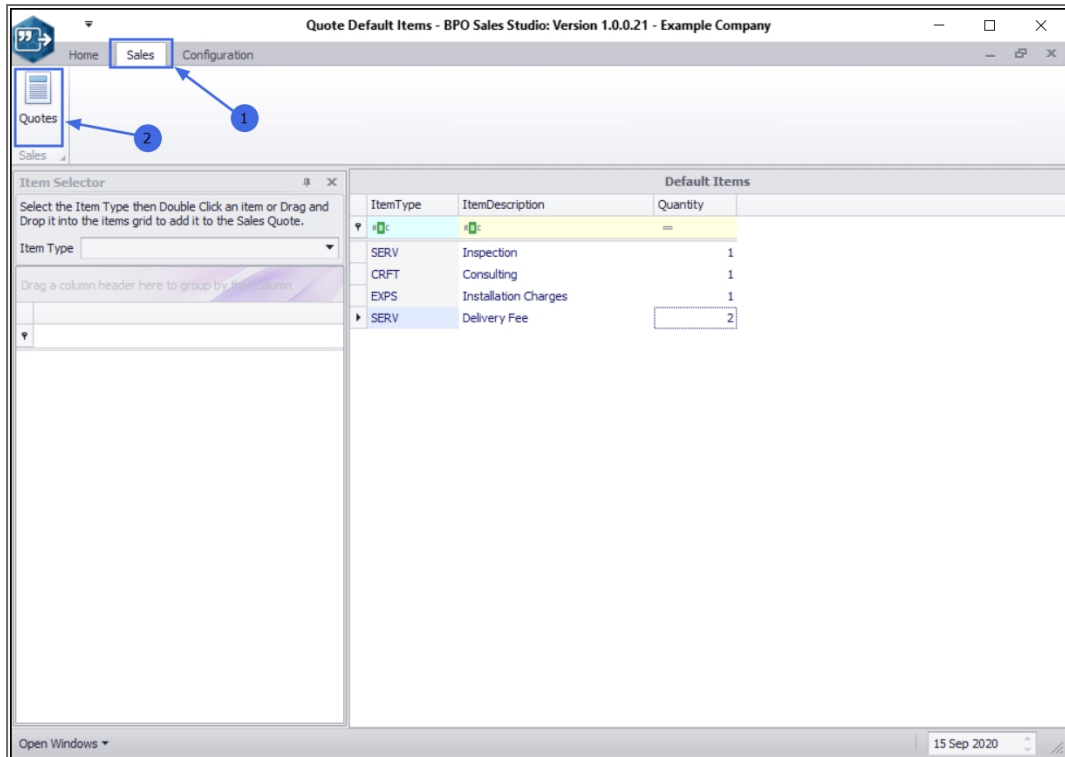


1. A **Quote Configuration** message box will pop up informing you;
  - Default items saved successfully.
2. Click on **Ok**.

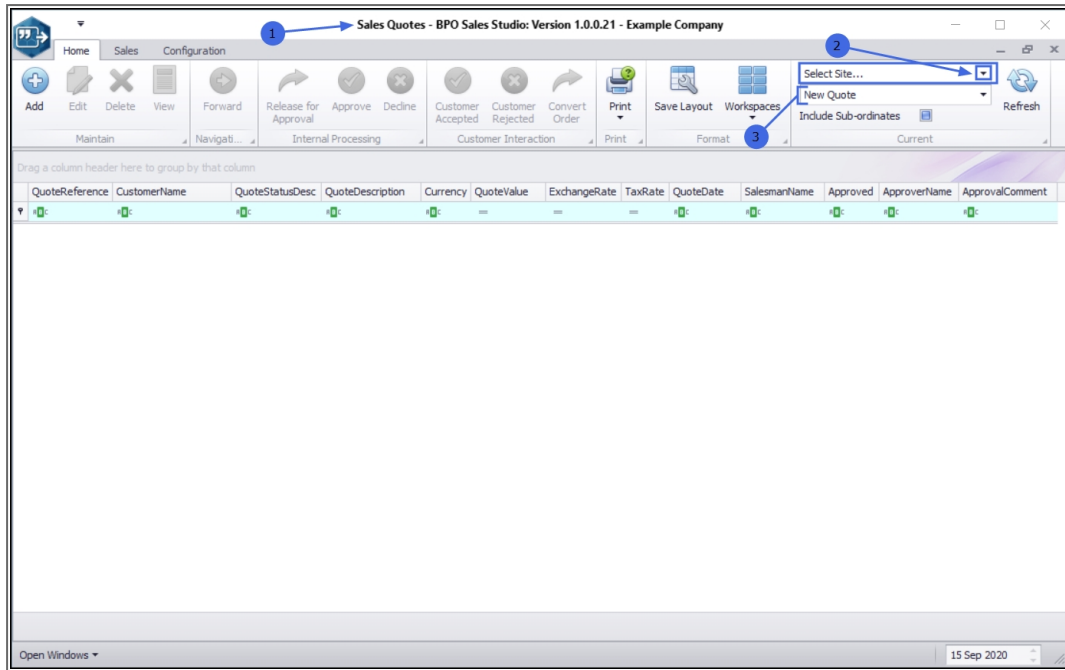


## VIEW EDITED DEFAULT ITEM ON A SALES QUOTE

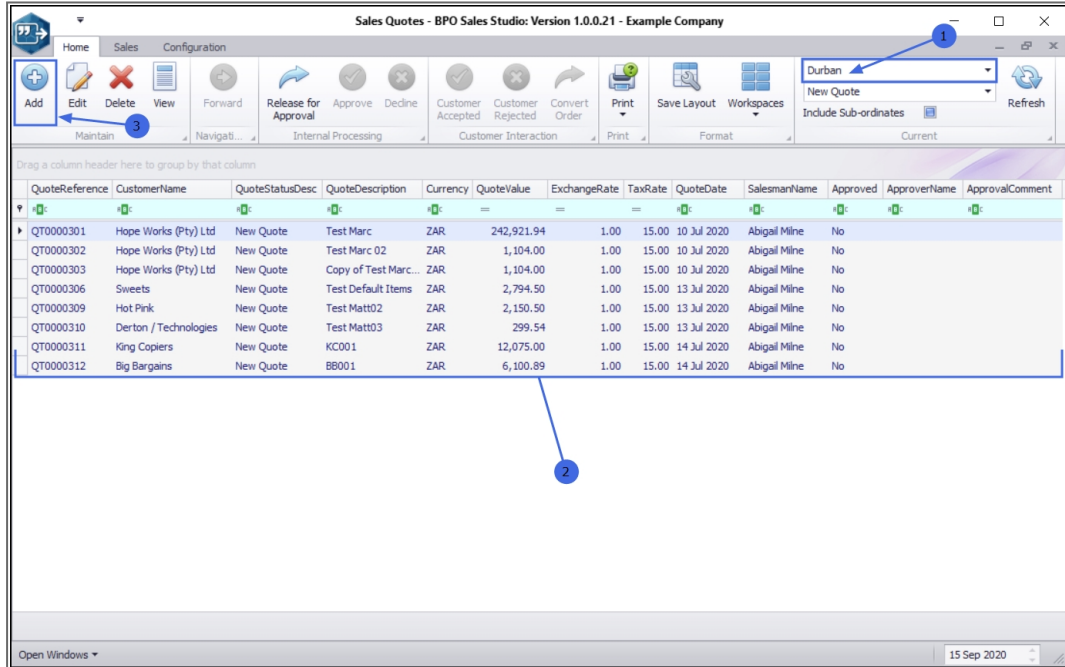
1. Click on the **Sales** ribbon tab.
2. The screen will refresh to display the **Quotes** toolbar button, click on this button.



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

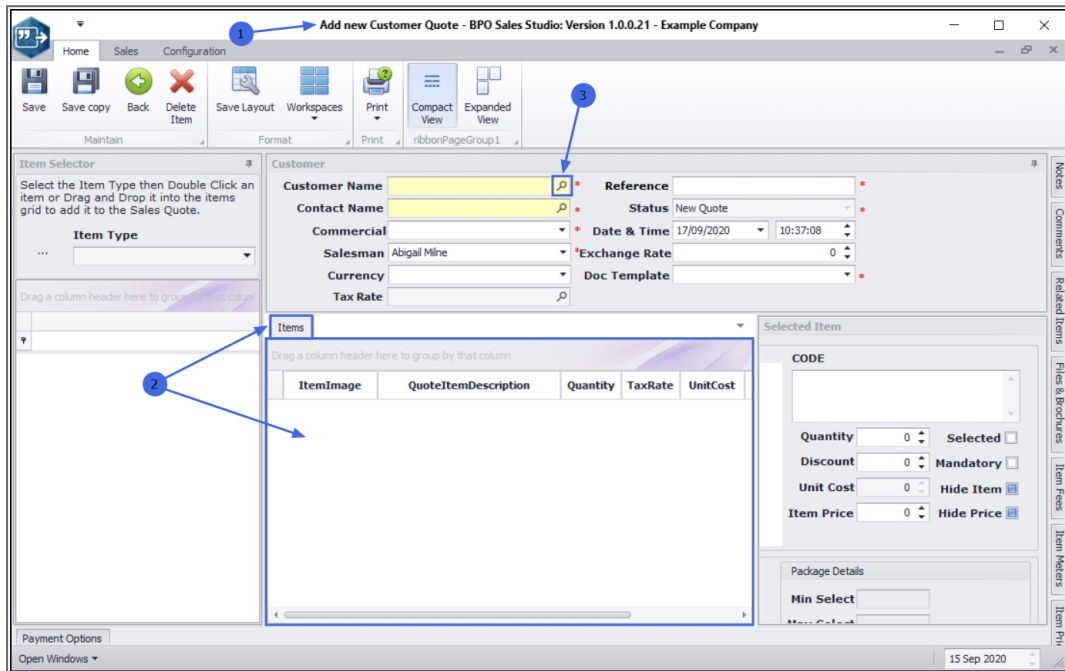


1. Once you have selected the site,
2. the data grid will populate with all the New Quotes linked to that specific site.
3. Click on **Add**.



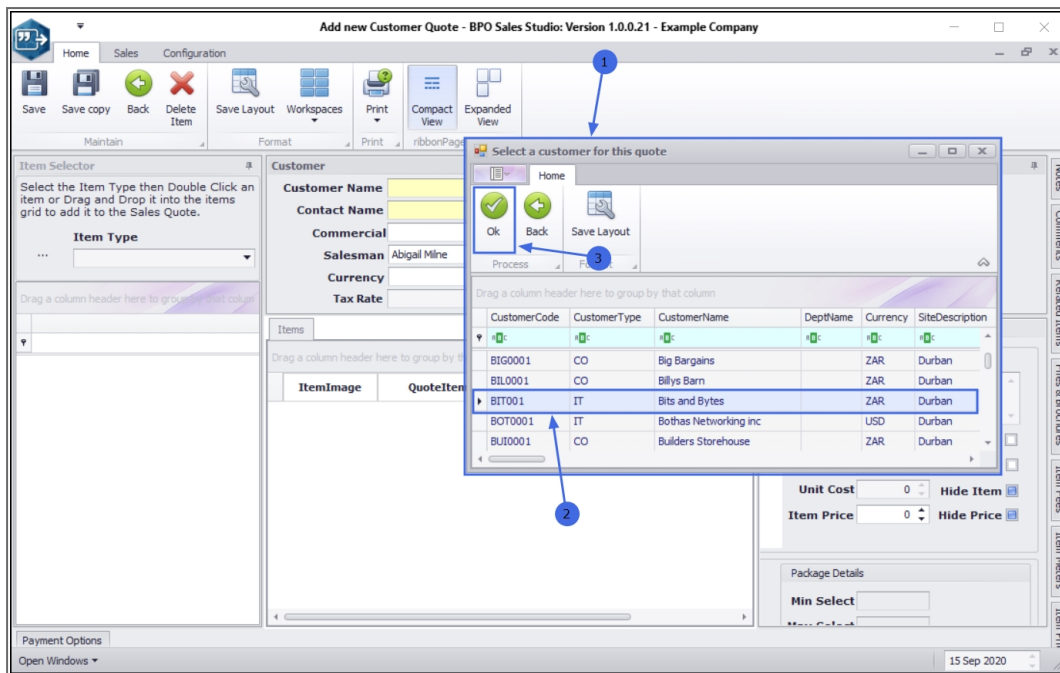


1. The **Add new Customer Quote** screen will open.
2. You will note that the **Items** frame does not yet contain any item details.
3. A customer needs to be selected before the default items will populate this frame. Click on the **search** icon in the **Customer Name** field.



The screenshot shows the 'Add new Customer Quote' screen in BPO Sales Studio. The interface includes a ribbon with 'Home', 'Sales', and 'Configuration' tabs. The 'Customer' section contains fields for Customer Name, Contact Name, Commercial, Salesman, Currency, Tax Rate, Reference, Status, Date & Time, Exchange Rate, and Doc Template. The 'Items' section is empty, with a table header showing ItemImage, QuoteItemDescription, Quantity, TaxRate, and UnitCost. The 'Selected Item' section on the right shows fields for CODE, Quantity, Discount, Unit Cost, Item Price, and Package Details. A blue box highlights the 'Items' section, and a blue arrow points to the search icon in the Customer Name field.

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



1. As the selected customer details populate the **Customer** frame,
2. the **Items** frame will populate with all the Default Quote Items as listed in the Quote Default Items screen.
3. You will note that the recently edited default item (images 3 and 4) now displays the **Quantity** amount as **2**.
4. Click on **Back** or **Close** (without saving any changes) to **exit** the 'Edit Customer Quote' screen and then **Close** the 'Sales Quotes' listing screen, to return to the **Quote Default Items** screen.

Edit Customer Quote - - Bits and Bytes - BPO Sales Studio: Version 1.0.0.21 - Example Company

Home Sales Configuration

Save Save copy Back Delete Item Save Layout Workspaces Print Compact View Expanded View

Maintain Format Print ribbonPageGroup 1

Item Selector

Select the Item Type then Double Click an item or Drag and Drop it into the items grid to add it to the Sales Quote.

Item Type 1

Drag a column header here to group by that column

Customer

Customer Name Bits and Bytes \* Reference \*

Contact Name \* Status New Quote \*

Commercial Default \* Date & Time 17/09/2020 10:37:08 \*

Salesman Abigail Milne \* Exchange Rate 1 \*

Currency South African Rand \* Doc Template \*

Tax Rate 15.00 \*

Items

Drag a column header here to group by that column

ItemImage	QuoteItemDescription	Quantity	TaxRate	UnitCost	Item Price
No image data	Consulting	1.000	15.000	550.000	
No image data	Installation Charges	1.000	15.000	0.000	
No image data	Inspection	1.000	15.000	800.000	
No image data	Delivery Fee	2.000	15.000	800.000	

3

Selected Item

CON

Consulting

Quantity 1 Selected ☒

Discount 0 Mandatory ☐

Unit Cost 550.0000 Hide Item ☐

Item Price 434.00 Hide Price ☐

Package Details

Min Select

Payment Options

Open Windows

15 Sep 2020

MNU.166.003

