

PROJECTS

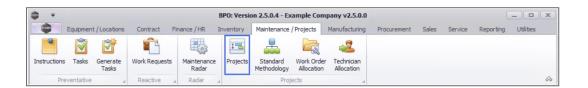
PROJECTS - QUOTES

You may need to raise a quote for additional work that needs be done. Approval from the customer is required, as the customer will be billed.

Once the customer has approved the quote, you then need to;

- Orders Convert to New Deal Sale / Rental
- Add Items to WO

Ribbon Access: Maintenance / Projects > Projects



- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site*.
 - The example has *Durban* selected.
- 3. Change the *Status* to *Open*.
- 4. Click on the *row* of the *project* that you wish to create a quote for.
- 5. Click on the *Quotes* tile.



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	@ PRJ0000412	Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
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	V 🗇 PRJ0000410	New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
	▶ E PR.30000408	Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
5		OSU1001	0	Open	31/03/2021	Julanda Kessler	No	OFF001	Office Supplies		
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		Design BPO2	0	Open	14/01/2019	Bianca Du Toit	Yes				
		Specification BPO2	0	Open	12/01/2019	Bianca Du Toit	Yes				
Invoices	PRJ0000396	Test BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes				
	PRJ0000395	BPO v2.2.0.1 Test Cyde	0	Open	08/02/2019	Bianca Du Toit	No				
		1234 - Test ctrt request crea	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Credit Notes		NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		credit validation check	0	Open	30/07/2018	Bianca Du Toit	No	OFF001	Office Supplies		
	PRJ0000391	test new project	0	Open	22/08/2018	Ben Johnson	No				

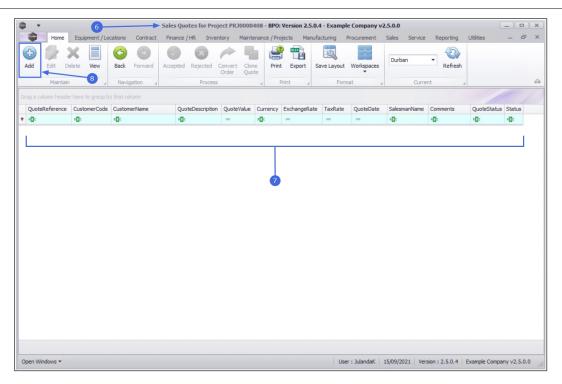
- 6. The *Sales Quotes for Project [project ref number]* listing screen will be displayed.
- 7. Any quotes that have already been created for the project will be listed on this screen.

ADD QUOTE

8. Click on Add.

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





- 9. "The Add new Customer Quote screen will display. " on page 2
- 10. You have the option to Quotes Apply Sales Template or Projects -Apply Project Methodology to the new sales quote.

CROSS REFERENCE

- 11. This frame will display all the *linked references* linked to this project, e.g. call number, serial number.
- 12. When a quote is created for a project from the Project Listing screen, then the *Project Reference* number will be auto linked to the quote.
- 13. When you have completed the quote information, click on *Save*.



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You will return to the *Sales Quotes for Project* listing screen.

EDIT QUOTE

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

- 1. From the Sales Quotes for Project [project ref number] listing screen,
- 2. Click on the *row* of the Quote you wish to make changes to.
- 3. Click on *Edit*.

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



			•			Sales Quo	otes for Pro	ject PRJ00	000408 - BPO	Version 2.5.0.4	4 - Example	e Company vi	2.5.0.0			_	
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	2																
	2																
	2												22/09/2021 Ver				

- 4. "The Edit Customer Quote QT[quote number] screen will display." on page 2
 - You have the option to Quotes Apply Sales Template as well as Quotes Apply Project Methodology to the Quote.
 - Make changes to the *Heading Information* or to Items in the *Sales Items grid*.
- Click on *Save* to save the changes and to return to the *Sales Quotes* for *Project* listing screen.



P		Equipment / Locati	ons Contra	act Finance / HR Inv	entory Ma	intenance / Projects	Manufa	act	uring Procurem	ent Sales	Service	Reporting	Utilities	-	8
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		Julanda Kessler South African Rand					• ‡		CALL Ca	all Reference					
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DELETE QUOTE

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

- 1. From the Sales Quotes for Project [project ref number] 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 *All groups* 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 of your selection.



	Home	Equipment / L	ocations Contract	Finance / HR Inven	tory Mainte	enance / Pro		acturing Pi		Sales Service	Reporting	Utilities	- 6	9
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The Sales Quote will be *removed* from the *Sales Quotes for Project* listing screen.

VIEW QUOTE

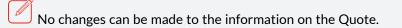
A Quote in any *Quote Status* can be Viewed.

- 1. From the Sales Quotes for Project [project ref number] screen,
- 2. Click on the *row* of the Sales Quote you wish to *view*.
- 3. Click on *View*



	Ŧ		- 1-			Sales Qu	otes for Pr	roject P	RJ00004	108 - BPO	Version 2.5	5.0.4 -	Example	Company v	2.5.0.0				
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4. The *View Customer Quote - [quote number]* screen will display.



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



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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 Gales Order that has been created for the selected Sales Quote.

- 1. From the Sales Quotes list screen, change the *Status* to *Invoiced Quote* to display a list of all invoiced quotes.
- 2. Click on the *row* of the Invoiced Quote 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**.

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QT0000023	DER001	Derton / Technologies	test	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		I	A	
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QT0000138	HOP001	Hope Works (Pty) Ltd	Generate Order	6,156.00	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		Ι	Α	
QT0000161	PAN001	Panda Copiers		44.96	USD	10.00	14.00	07/08/2017	Bianca Du Toit		Ι	Α	
QT0000029	TIA001	Titan Group	Part Request ch	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		Ι	Α	
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QT0000195	HOP001	Hope Works (Pty) Ltd	1234	34.20	ZAR	1.00	14.00	30/08/2017	Bianca Du Toit		Ι	Α	
QT000003	YES001	Young Electric	abc123	16,769.40	ZAR	1.00	14.00	06/05/2014	Karlien Jessic		I	Α	
QT0000052	HOP001	Hope Works (Pty) Ltd	test	4,674.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm		I	Α	
QT0000066	DER001	Derton / Technologies	test cross refer	1,000.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm		I	Α	
QT0000218	HOP001	Hope Works (Pty) Ltd	test	483.00	ZAR	1.00	15.00	23/04/2018	Bianca Du Toit	test	I	Α	
QT0000032	TIA001	Titan Group	test	1,154.27	ZAR	1.00	14.00	05/08/2014	Belinda Sharm		Ι	Α	
QT0000026	HOP001	Hope Works (Pty) Ltd	Test Edit Sales	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		Ι	Α	
QT0000012	OFF001	Office Supplies Unlimited	OR 14789	950.49	ZAR	1.00	14.00	02/07/2014	Belinda Sharm		I	Α	
QT000035	DER001	Derton / Technologies	test	285.00	ZAR	1.00	14.00	25/09/2014	Belinda Sharm		I	A	

BACK NAVIGATION

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



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	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		04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60		09/01/2019	Bianca Surend	1.00		05:06:46		
	OR0000297	NEW 101	New Customer Test	New order	test	150.00		17/09/2019	Bianca Du Toit	1.00		10:46:59		
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00		07/04/2020	Kame Pillay	1.00		12:31:21		
	OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60		09/04/2020	Kame Pillay	1.00		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 Project [project ref number] 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*.

- 3. When you receive the *Input Validation* message to confirm;
 - Are you sure you want to update this quote, no. [quote number] to be Accepted? Answer 'Yes' to mark it as Accepted.
- 4. Click on Yes.



ф т	1	Sale:	s Quotes for Proje	ect PRJ00004	108 - BPO:	Version 2.5.0.4	- Example	Company	/2.5.0.0			_ 0	x
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I QT0000325	OFF001	Office Supplies Unlimited	PRJ408/1	3,450.00	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Project Quote	N	A	
QT0000326	HOP001	Hope Works (Pty) Ltd	PRJ408/2	402.50	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Travel within 1	N	A	
		115	Accepted			4 this quote, no. C ed. <u>Y</u> es	2T0000325 to						
Open Windows -							User :	: JulandaK	23/09/2021 Ver	sion : 2.5.0.4 E	xample Compar	iy v2.5.0	0.0

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 Projects [project number] screen,
- 2. Click on the *row* of the Sales Quote that needs to be *rejected*.
- 3. Click on *Rejected*.

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

- 3. When you receive the *Input Validation* screen to confirm;
 - Are you sure you want to update this quote, no. QT[quote number] to be Rejected? Answer 'Yes' to mark it as Rejected.



4. Click on Yes.

•		Sales	s Quotes for Proje	ect PRJ00004	108 - BPO:	Version 2.5.0.4	- Example	Company v2	1.5.0.0				X
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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 Project [project ref number] screen,
- 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:



- 4. When you receive the first *Order Generation* message to confirm;
 - Are you sure you want to convert quote QT[quote number], for Customer [customer name] to an order?
- 5. Click on Yes.

Maintain Navigation Image: Process Print Format Current g a column header here to group by that column QuoteReference CustomerCode CustomerName QuoteDescription QuoteValue Currency ExchangeRate TaxRate QuoteDate SalesmanName QuoteStatus Status QL	Add Edit De	elete View	Back Forward Acc		Convert Clon Order Quot		t Export Sa	ve Layout	Workspaces	Durban	• Refresh		
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5 <u>Yes</u> <u>No</u>	2		Orde	Are you sure	e you want to c		ote QT0000325 fr	or custome	× r Office				
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- 6. The second *Order Generation* message will confirmation;
 - Do you wish to close the quote [quote number] off? No further orders will be possible from this quote if it is closed.
- 7. Click on Yes.



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- 8. The third *Order Generation* message will confirm;
 - 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.



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

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 Project [project ref number] 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*.



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Q	T0000326	HOP001	Hope Works (Pty) Lt	d PRJ408/2	402.50	ZAR	1.00	15.00	22/09/2021	Julanda Kessler	Travel within 1	N	Α	

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 the *Line Item details*, if required.
- You can also choose to apply a Quotes Apply Sales Template, which will be appended to the existing quote items, as well as Quotes - Apply Project Methodology to the cloned quote, if required.

For a detailed handling of this topic refer to Quotes - Clone a Quote



7 Customer Name Contact Name Commercia Salesman Currence	Apply Sale Template Mainta me Office me Accour cial Type C an Juland acy South ate 15.00 nt Quote Exper	te Methodol Itain e Supplies Unlin punts Contact e Class Commer nda Kessler th African Rand 10 ote Litem Type our eenses	oject Delete Item mited	Save Layo Format	out Print Print Reference Status ate & Time	PRJ408/1 New Quote		ge	RefTyp WKOR QUOT ASMN CALL CTRT PMNG	e R V S S C C	5 ReferenceType Work Order Refe sales Quote ierial No Call Reference Contract No	erence	eferenceNo	Ublities		Î
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PRINT QUOTE

- 1. From the *Sales Quotes for Project [project ref number]* listing screen,
- 2. Click on the *row* of the Quote you wish to print.
- 3. Click on *Print*.



	Ψ		1			Sales Q	uotes for	r Proje	CT PRJ00004	108 - BPO	Version 2.5	.0.4 - E	Example	Company va	2.5.0.0				
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QT	0000325	OFF00	L	Office Su	pplies Unlim	ited P	RJ408/1		3,450.00	ZAR	1	L.00	15.00	22/09/2021	Julanda Kes	sler Project Quote	N	A	
QT	0000326	HOP00	1	Hope Wo	rks (Pty) Lto	d P	RJ408/2		402.50	ZAR	1	L.00	15.00	22/09/2021	Julanda Kes	sler Travel within 1	N	Α	

- The *Select the option as desired* message screen will display with the following options;
 - Print Quote will open the Sales Quote in the Preview screen to view, print, export or email.
 - Email Quote will allow you to add recipients and the

system will create a .pdf of the Sales Quote as an Attachment to the email.

• Fint and Email Quote will display both the Report Pre-

view and Email screens.

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 on *Accept*.

¢	Ŧ		Sale	s Quotes for Proje	ect PRJ00004	108 - BPO:	Version 2.5.0.4	- Example	Company v	2.5.0.0			_ 0	X
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	0000325	OFF001	Office Supplies Unlimited	PRJ408/1	3,450.00		1.00		22/09/2021	Julanda Kessler			A	
-	0000326	HOP001	Hope Works (Pty) Ltd	PRJ408/2	402.50		1.00			Julanda Kessler			A	
				Proce		nt Quote ail Quote nt and Emai	I Quote		*					

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





MNU.058.011