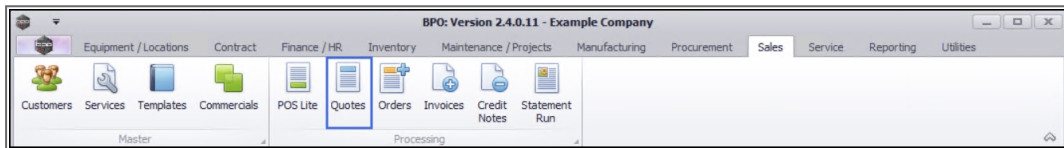


# SALES

## QUOTES - ADD SALES QUOTE

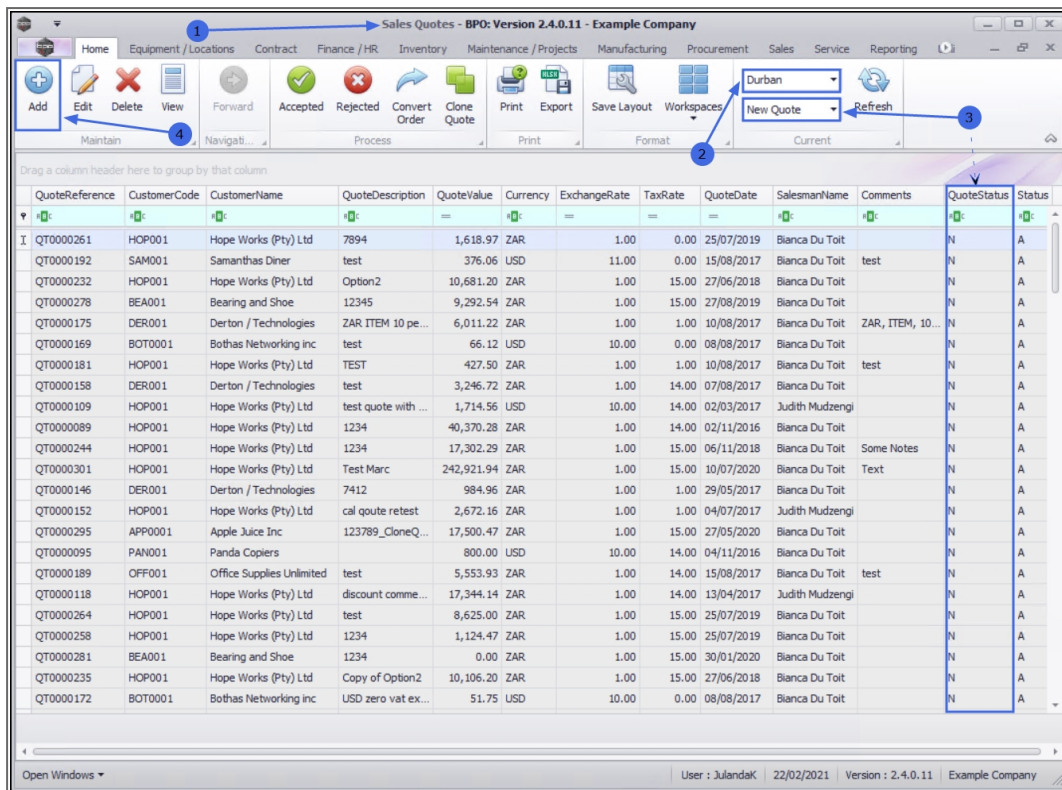
*Ribbon Access: Sales > Quotes*



1. The **Sales Quotes** listing screen will display.
  - Select the **Site** where the quote needs to be created.
2. The example has **Durban** selected.
3. You can Create a Quote in any**Status**.
  - The example has **New Quote** selected as it will list all the **N - New Quotes** in the Quotes listing screen.
4. Click on **Add**.



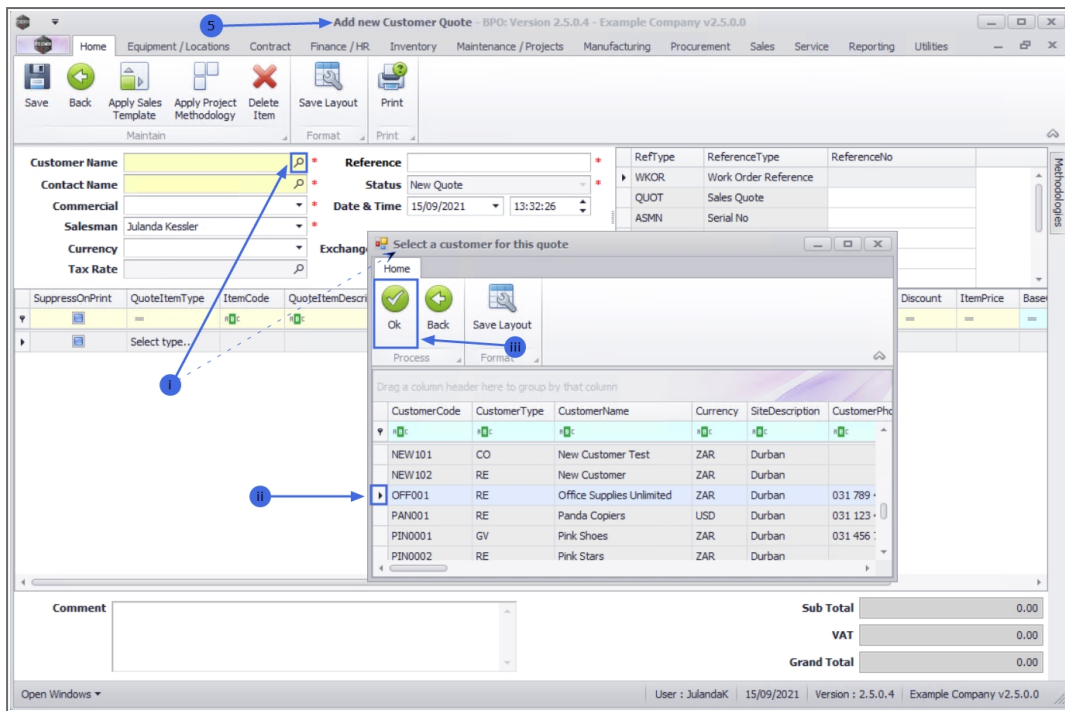
Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



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

## QUOTE HEADER

- **Customer Name:**
  - i. Click on the **search** button to display the **Select a customer for this quote** screen.
  - ii. Click on the **row** of the Customer you are creating the quote for.
  - iii. Click on **OK**.



- **Contact Name:** Click on the **search** button to select the contact person at the company from the **contact for this quote** screen, following the steps **i** to **iii** above.
- **Commercial<sup>1</sup>:** The commercial linked to the selected customer will auto populate the commercial field, but a different commercial can be selected, if required.
- **Salesman:** This field will auto populate with the salesman currently logged on to the system and the person who is responsible for this quote. Click on the **search** button and select an alternative salesman, if required.



This is an important record for commission purposes.

<sup>1</sup>Commercial is the mark up structure for the item. The original price of the item, including the company profit margin

- **Reference:** Type in a reference for the quote.

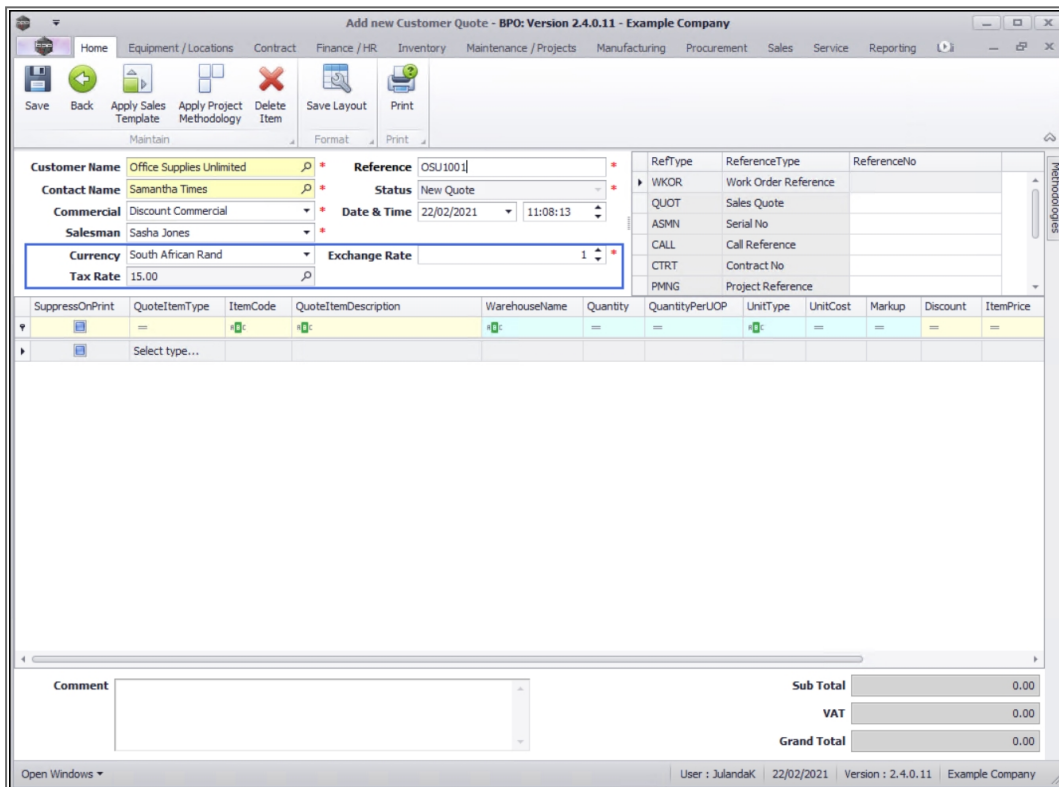


Note that the reference is for internal use and is very important to find and identify the quote, once it has been processed.

- **Status:** This field will default to '**New Quote**' and cannot be changed. (Note that the field has been grayed out.)
- **Date & Time:** Date and time will display the **current date and time**.
  - To change the date, type an alternative date or click on the down **arrow** to select the date using the calendar function.
  - To change the time, type or use the directional **arrows** to select an alternative time.

## FINANCIAL HEADER

- **Currency:** The currency will default to the currency set up for the customer. Click on the down **arrow** to select an alternative currency from the currency menu.
- **Tax Rate:** The tax rate will default to the tax rate set up for the customer and cannot be changed from this screen. (Note that the field has been grayed out.)
- **Exchange Rate:** The exchange rate will populate based on the exchange rate that was set up in the system. Type in or use the directional **arrows** if an alternative exchange rate is required.



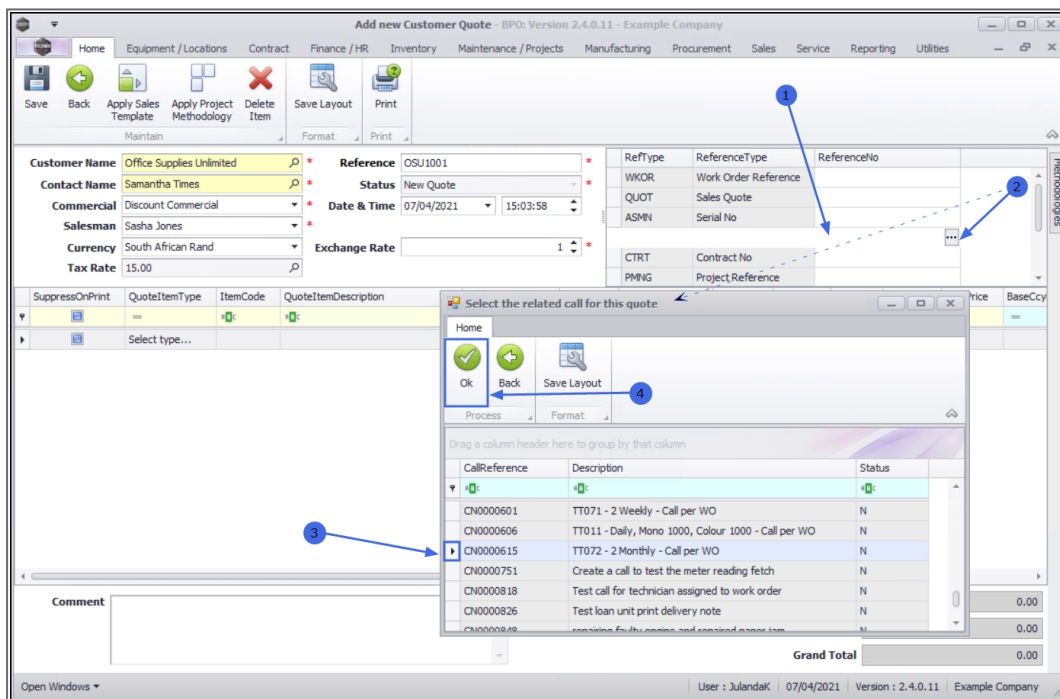
## CROSS REFERENCE

- From the cross reference frame you can link reference types to the quote you are creating.

- Reference types that have references linked, will have the reference numbers populated on the screen. For example, if a quote is being raised for a particular **call** or **contract** then the call or project reference number will be listed.

## Link a Reference

1. To link the order to a **Reference Type** click in the Reference No text box to display the ellipsis button.
2. Click on the **ellipsis** button to display the **Select the related [ ] for the quote** screen.
  - The message screen will display related information to the Reference information you are searching for.
  - The example has Call Reference selected and therefore the **Select the related call for this order** screen is displayed
3. Click on the **row** of the **Call Reference** you wish to link to the quote.
4. Click on **OK**.



### ***Apply Sales Template***

---

- Quote items that frequently appear on a Customer Quote, can be set up as a Sales Template.

- When you click on the [Quotes - Apply Sales Template](#) button, the quote will auto populate with the Items specified on the template you choose.

- You can add to, or remove items, as required, after which you can then adjust the quantities and selling price(s).

- You may choose to apply more than one Quote template to the Quote you are creating.

### ***Apply Project Methodology***

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When you click on the [Quotes - Apply Project Methodology](#) button, the Project Methodology is applied to the quote. The system will generate sub projects and work orders as set up in the methodology layers, once the quote has been converted into a New Deal Project.

If there are resource requirements specified, then these resources will be requested.

One, or multiple methodologies can be applied to a quote.

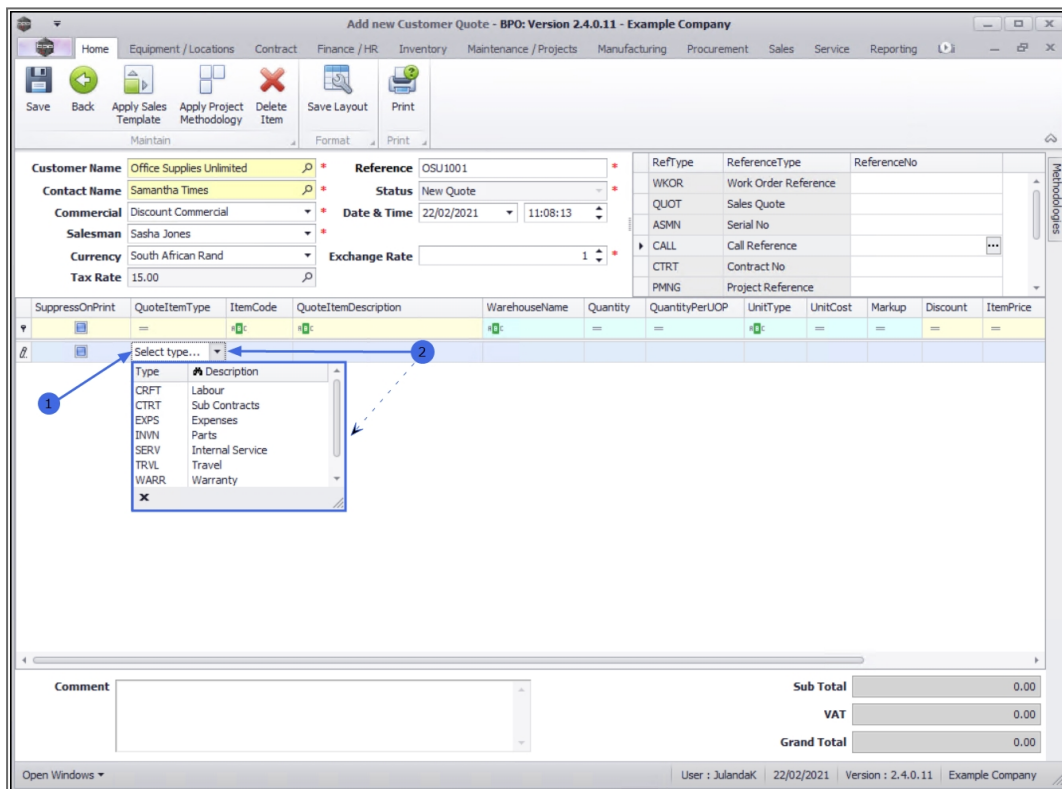
A Project Methodology and Sales Templates can both be applied to the same sales quote.

## **ADD QUOTE ITEM**

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On the *Quote Items* data grid;

1. Click in the **Quote Item Type** text box to display the **Item Type** menu.
2. From the menu list, you can select;
  - **CRFT** (Labour craft, i.e. Technician)
  - **CTRT** (Third Party Labour/Service)
  - **EXPS** (Expenses)
  - **INVN** (Part)
  - **SERV** (Internal Labour/Service)
  - **TRVL** (Travel)
  - **WARR** (Warranty sale)
  - **OTHR** (Type in any additional items to quote) **Note:** This will **not** be pulled through when the quote is converted to a sales order. When the quote is confirmed, then this item can be set up as a part or a service, which then can be linked to the quote, in it's place).





- Click on the **Item Code** text box to display the *ellipsis* button.
- Click on the ellipsis button to display the **Select a [ ]** screen.



Note that the **Select a [ ]** screen that is displayed, will be according to the **Quote Item Type** you have selected i.e. if Labour had been selected, then the **Select a *craft*** screen would display.

- The example has **Parts** selected as the **Quote Item Type** and therefore the **Select a *part*** screen is displayed.
- Click on the **row** of the **item** you wish to add.
  - Click on **OK**.

- The **Quote Item Description** and **Warehouse Name** fields will auto populate once the **Item Code** has been selected.

- Make the necessary changes to the **Quantity**, **Discount** and **Unit Selling Price** by clicking in the text box and **type** or use the **directional arrows** to enter the correct amounts.

## NEXT QUOTE ITEM ROW

- To **add** a new line, click anywhere on the Item line data grid area or press **Tab** at the end of the previous item line to open a new item row.

SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice
	Parts	SP1717MFC	SP1717 Multi Functional Copier	Main Warehouse	1.000	0.000	0.000	0.000	0.000	10.000	8,540.000

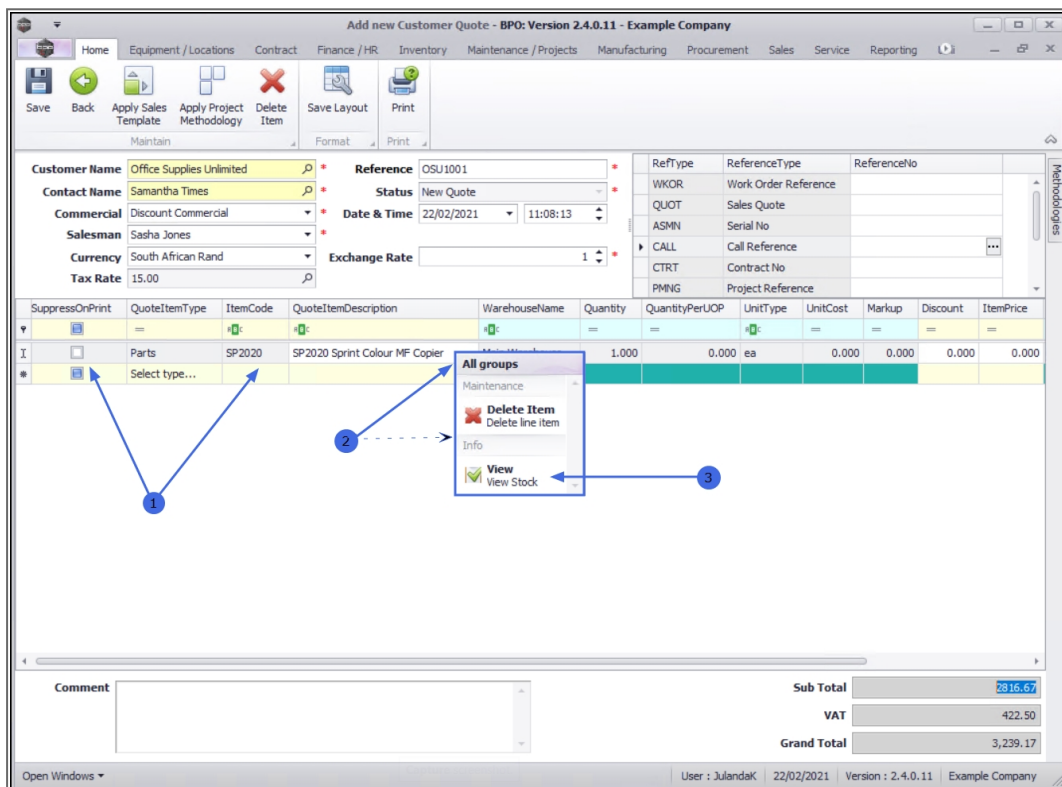
## VIEW STOCK

A View Stock functionality has been added to the Sales Quotes and Sales Orders screens (available in later versions of BPO).

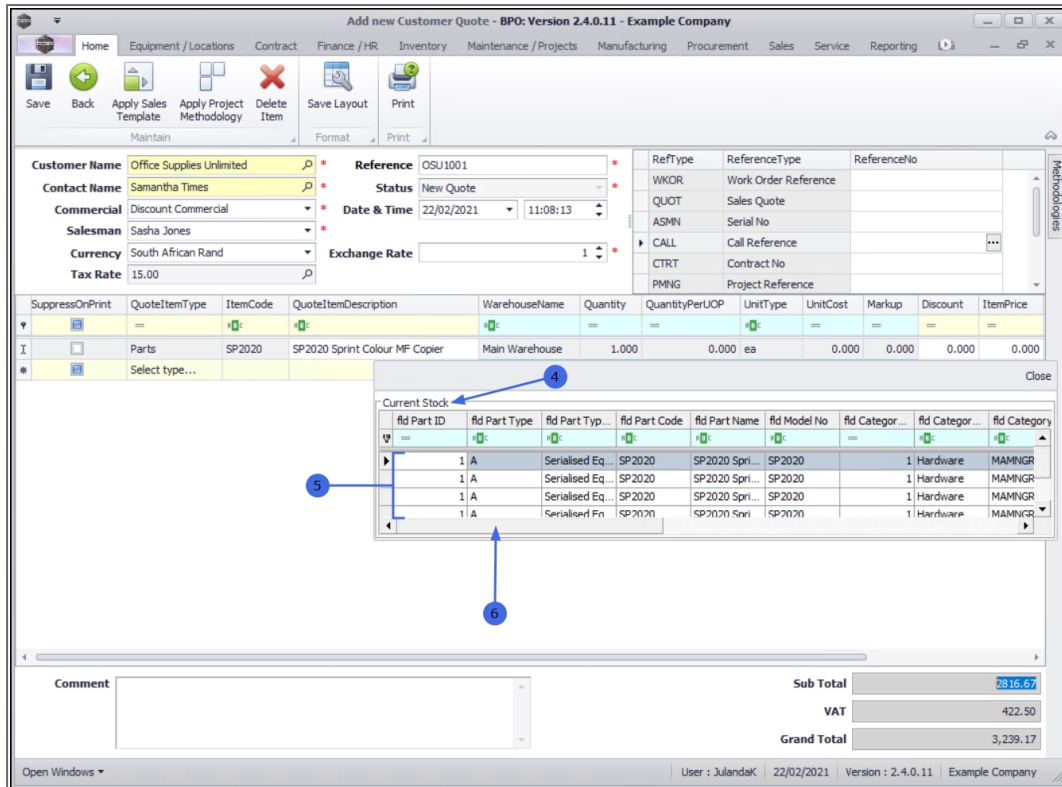
When creating the quote, the salesman is able to check the stock quantities of an item(s) that needs to be added to the quote. If a particular item is

short stock, then the customer can be informed that there may be a delay in delivery, or that there is an alternative substitute stock item available, which the customer may prefer, if the Customer prefer to receive an order on time. This enables the salesman to manage the customer's expectations.

1. **Right click** in the *row* of the item that you wish to view the stock quantity of.
2. An **All groups** menu screen will display.
3. Select **View - View Stock**.

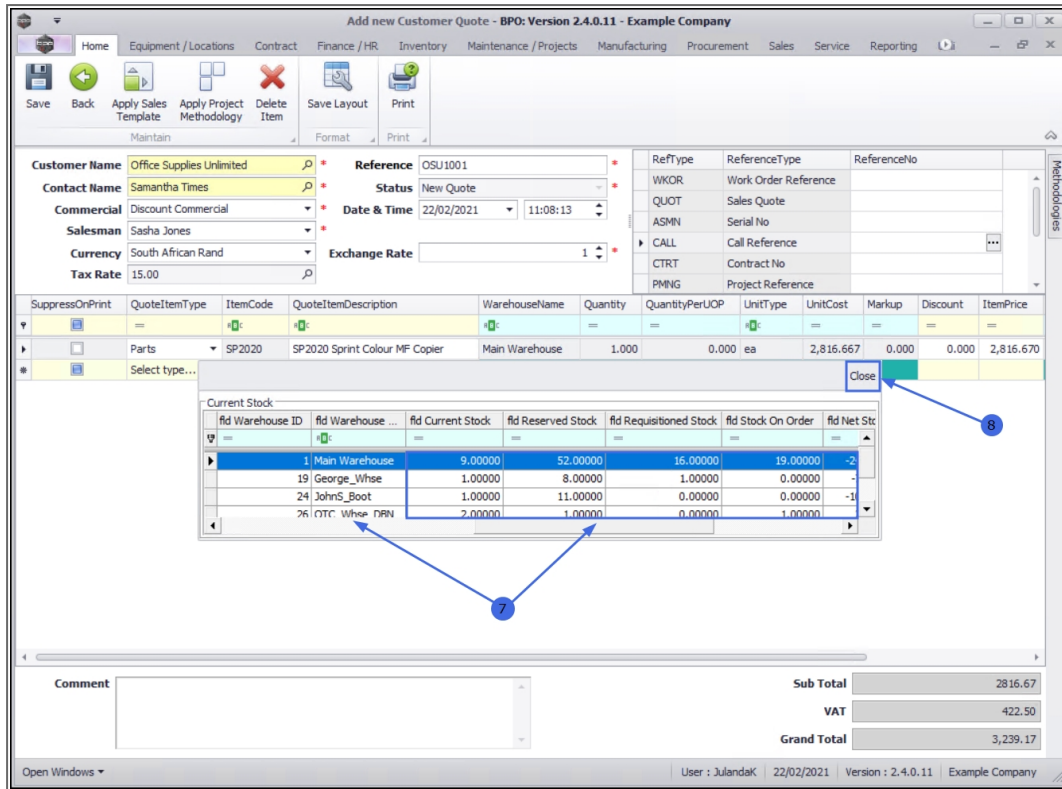


4. The **Current Stock** screen will display.
5. Each row represents a **warehouse** that contains stock of the item.
6. Using the scroll bar at the bottom of the screen, scroll right until you can view the stock **quantities** in each warehouse.



7. You will now be able to view *how much* stock is in each Warehouse.
8. This list now also returns alternate parts in stock : Version Compatibility<sup>1</sup>
9. Click **Close** on the Current Stock data grid when you are done.

<sup>1</sup> BPO2 v2.4.0.11 or higher



## COMMENTS

- Click in the Comments text box to type a **comment** for this quote. The comment will display on the **quote document**.

## SAVE QUOTE

- When you have finished adding all the required items, click on **Save**.

The new quote can now be viewed in the *Sales Quotes* listing screen where the status is set to *New quote*.

Sales Quotes - BPO: Version 2.4.0.11 - Example Company

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

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

Maintain Navigati... Process Print Format Current

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
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
QT0000111	HOP001	Hope Works (Pty) Ltd	QT0000111	6,258.60	ZAR	1.00	14.00	17/03/2017	Judith Mudzengi		N	A
QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test M...	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A
QT0000103	HOP001	Hope Works (Pty) Ltd		8,685.66	ZAR	1.00	14.00	16/02/2017	Bianca Du Toit		N	A
QT0000097	BOT0001	Bothas Networking Inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	A
QT0000246	APP0001	Apple Juice Inc		920.00	ZAR	1.00	15.00	21/11/2018	Bianca Du Toit		N	A
QT0000237	APP0001	Apple Juice Inc	Copy of 1234	982.10	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	A
QT0000120	HOP001	Hope Works (Pty) Ltd	Retest	21,931.32	USD	7.00	14.00	20/04/2017	Judith Mudzengi		N	A
QT0000306	SWE0001	Sweets	Test Default Ite...	2,794.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A
QT0000312	BIG0001	Big Bargains	BB001	6,100.89	ZAR	1.00	15.00	14/07/2020	Abigail Milne		N	A
QT0000260	HOP001	Hope Works (Pty) Ltd	test	920.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	A
QT0000220	APP0001	Apple Juice Inc	C copy Test sou...	81.94	ZAR	1.00	15.00	29/05/2018	Belinda Sharm...		N	A
QT0000114	HOP001	Hope Works (Pty) Ltd	1234	4,227.25	ZAR	1.00	14.00	12/04/2017	Bianca Du Toit	test	N	A
QT0000266	HOP001	Hope Works (Pty) Ltd	Copy of test	10,005.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	A
QT0000080	YES001	Young Electric	New123	567.23	ZAR	1.00	14.00	21/09/2016	Bianca Du Toit	Test custom f...	N	A
QT0000277	APP0001	Apple Juice Inc	Test Quote	6,509.54	ZAR	1.00	15.00	21/08/2019	Bianca Du Toit		N	A
QT0000174	HOP001	Hope Works (Pty) Ltd	BPO Quote deta...	513.00	ZAR	1.00	15.00	08/08/2017	Bianca Du Toit		N	A
QT0000320	OFF001	Office Supplies Unlimited	OSU1001	3,239.17	ZAR	1.00	15.00	22/02/2021	Sasha Jones	Full installation...	N	A
QT0000249	APP0001	Apple Juice Inc	test	993.60	ZAR	1.00	15.00	09/01/2019	Bianca Surend...		N	A
QT0000180	SAM001	Samanthas Diner	USD, 0, 10, TYPE	171.54	USD	10.00	0.00	10/08/2017	Bianca Du Toit		N	A
QT0000206	HOP001	Hope Works (Pty) Ltd	Test Links	1,593.96	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit		N	A
QT0000300	HOP001	Hope Works (Pty) Ltd	AB017	259,864.04	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned a quot...	N	A
QT0000100	BOT0001	Bothas Networking Inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A

Open Windows User: JulandaK 22/02/2021 Version: 2.4.0.11 Example Company

## VIEW QUOTE IN CRM

The new quote will pull through to **CRM** where it can be viewed.

### Related Topics

- [Quotes - Apply Sales Template](#)
- [Quotes - Apply Project Methodology](#)
- [Quotes - View Quote in CRM](#)
- [Quotes - Clone a Quote](#)
- [Quotes - Print a Sales Quote](#)

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