

SALES

QUOTES - ACCEPTED

Ribbon Access: Sales > Quotes

٢	Ŧ						BPO: Ver	sion 2.4.	0.11 - Exar	nple Company					_	x
- 🔹	Equ	pment / Locations	Contract	Finance /	HR	Inventory	Mainte	enance / I	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
Custor		ices Templates	Commercials	POSLite		Orders		Credit	Statement							
Custo	nera der	nees remplates	commercials	POSILIC	Quotes	orders	11VOICE5	Notes	Run							
		Master	4			Proce	essing									\sim

- 1. The *Sales Quotes* listing screen will display.
- 2. Select the *Site* where the quote was created.
 - The example has *Durban* selected.
- 3. Sales Quotes can only be *Accepted* in the New Quote status.
 - Ensure the *Status* is set to *New Quote*.
- 4. Click on the *row* of the Quote you wish to convert to accepted.
- 5. Click on *Accepted*.

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



7			1			Sales Qu	otes - BPO:	/ersion 2	.4.0.11	- Example	e Company				(
	Home	Equipment	Locations Con	ntract Fin	nance / HR	Invent	ory Mainte	mance / Pr	ojects	Manufac	turing Pro	ocurement	Sales Service	Reporting	L®I -	8
4		¥ =	6		x	à		<u> </u>	5 2	50		Durt	an 🔻	422		
Add	Edit I	Delete View	Ecoward	Accepted	Pajacted	Convert	Clone	Print E		Savelave	wit Worker			Pafrash		
Auu	Lun		T OF Ward	Accepted	Rejected	Order	Quote	Philit La	Apor c	Save Laye		New New	Quote •	Kellean		
	Maintai	in 🤨	A Navigati A		Proces	s	4	Print	4	F	Format	1	Current	3		
A a col											2					
QuoteR	Deference	CurtomerO	da OuctomarNar		QueteDe	ecription	QuoteValue	Currence	Evel	ancePate	TayDate	QuoteDa	SalacmanNama	Commente	QuoteStatur	Ctat
	Nerer ence			lic	Quotebe	scription	Quotevalue	alle	- LAUI	angenate		Quoteba =	Jaicsmanname	alle	Quotestatus	Jan Contract
OTOOO	0045	DOMODOL	Darah Dura with	h Crimeres	- Mar		14 000 12	740		1.00	14.00	00/05/2015	Diana Du Taik		NI.	
OTODO	0045	OFF001	Office Supplie	as I Inlimited	Machino	netalla	30 120 04	2MR		1.00	14.00	19/10/2015	Belinda Sharm	test comment	N	~
Q10000	0064	HOP001	Hope Works	(Pby) 1 td	TEST	natalia	459.04	7AD		1.00	14.00	12/11/2015	Jerry View	test connert	N	4
010000	0067	DEP001	Dertop / Tech		tect		570.00	740		1.00	14.00	22/11/2015	Belinda Charm	test another c	N	~
070000	0007	HOP001	Hope Works	(Pby) Ltd	test		171.00	740		1.00	14.00	27/05/2016	Deliriua Sriariti		N	~
070000	0230	APP0001	Apple Juice I	(+ (y) L (u)	Convoft	Jaw 123	4 597 20	740		1.00	15.00	21/09/2016	Rianca Du Toit	Test custom r	N	~
070000	0242	APP0001	Apple Juice I	nc	Copy of	0004.0	4 597 20	740		1.00	15.00	21/09/2016	Bianca Du Toit	Test custom r	N	^
OT0000	0080	YES001	Young Electri	c	New123		567.23	ZAR		1.00	14.00	21/09/2016	Bianca Du Toit	Test custom r	N	Δ
OT0000	0081	ERN0001	Ernser, White	e and Gove	Basic mad	hine in	4,745,59	ZAR		1.00	14.00	04/10/2016	Bianca Du Toit	SP 19 19 machi	N	4
OT0000	0086	APP0001	Apple Juice It	nc	iouvhki		8,347,60	ZAR		1.00	14.00	01/11/2016	Belinda Sharm		N	A
OT0000	0087	BET0001	Betties Summ	ner Shop at	test		599.26	ZAR		1.00	14.00	01/11/2016	Belinda Sharm		N	A
OT0000	0084	DER001	Derton / Tech	nologies	test editi	na auo	1,747,48	ZAR		1.00	14.00	01/11/2016	Bianca Du Toit	edit on custom	. N	A
OT0000	0085	DER001	Derton / Tech	nologies	edit quot	e with	2,183,96	ZAR		1.00	14.00	01/11/2016	Bianca Du Toit	test	N	A
QT0000	0089	HOP001	Hope Works	(Pty) Ltd	1234		40,370.28	ZAR		1.00	14.00	02/11/2016	Bianca Du Toit		N	A
QT0000	0088	HOP001	Hope Works	(Pty) Ltd			1,112.00	ZAR		1.00	14.00	02/11/2016	Bianca Du Toit		N	A
QT0000	0093	PAN001	Panda Copier	s			550.00	USD		10.00	14.00	03/11/2016	Bianca Du Toit		N	A
QT0000	0090	HOP001	Hope Works	(Pty) Ltd			91,651.06	ZAR		1.00	14.00	03/11/2016	Bianca Du Toit		N	А
QT0000	0095	PAN001	Panda Copier	rs			800.00	USD		10.00	14.00	04/11/2016	Bianca Du Toit		N	Α
QT0000	0094	PAN001	Panda Copier	rs			0.00	USD		10.00	14.00	04/11/2016	Bianca Du Toit		N	Α
QT0000	0096	BOT0001	Bothas Netwo	orking inc			525.66	USD		10.00	14.00	10/11/2016	Bianca Du Toit	Test	N	А
QT0000	0097	BOT0001	Bothas Netwo	orking inc	test		60.01	USD		10.00	14.00	10/11/2016	Bianca Du Toit		N	Α
OTOOO	0000	1000004	11 141l	me Area	0700000	00	4 170 40	1100		10.00	14.00	00/00/0017	2		NI.	

- 6. When you receive the *Input Validation* message to confirm;
 - Are you sure you want to update this quote, no. QT [quote number] to be Accepted? Answer 'Yes' to mark it as Accepted.
- 7. Click on **Yes**, if you are certain about your selection.
 - Clicking on *No* will ignore the request and to leave the Quote in the New Quote status.



					58	ales Quo	tes - BPO: V	ersion 2.4	1.0.11	- Example	Company					
	Home	Equipment / Loo	cations Contrac	t Fina	ance / HR.	Invento	ry Mainte	nance / Pro	jects	Manufac	turing Pro	ocurement	Sales Service	Reporting I	.ei –	8
			6	\checkmark	8	à		<u>_</u>	A	SI		Du	rban 🔻	42		
Add	Edit Dale	ata Viaw	Ecoward Ar	cented	Paiacted I	Convert	Clone	Drint Ev		Savelave	wit Worker	acae		Defrech		
Add	cuit Dele	ete view	PUTWARU AL	cepteu	Rejected	Order	Quote	Print EX	DOLL	Save Layo	ut worksp	Ner Ner	w Quote 🔻	Kellesh		
	Maintain	4	Navigati		Process		4	Print	4	F	ormat		Current	4		
OuoteRe	eference	CustomerCode	CustomerName		OuoteDesc	ription	OuoteValue	Currency	Excha	angeRate	TaxRate	OuoteDa	 SalesmanName 	Comments	OuoteStatus	Statu
					10c	- and -	=	n C	=	angertate.	=	=		* C	R. C.	
OT0000	045	DON0001	Dont Run with Sci	icenre	test		14 086 13	748		1.00	14.00	08/05/2015	Bianca Du Toit		N	4
OT0000	061	OFF001	Office Supplies Ur	nlimited	Machine in	stalla	30,129,04	ZAR		1.00	14.00	19/10/2015	Belinda Sharm	test comment	N	A
OT0000	064	HOP001	Hope Works (Ptv)) Ltd	TEST		458.85	ZAR		1.00	14.00	12/11/2015	Jerry View	test another c	N	A
QT0000	067	DER001	Derton / Technolo	ogies	test		570.00	ZAR		1.00	14.00	23/11/2015	Belinda Sharm		N	A
QT0000	070	HOP001	Hope Works (Pty)) Ltd			171.00	ZAR		1.00	14.00	27/05/2016			N	A
QT0000	230	APP0001	Apple Juice Inc		Copy of Ne	ew 123	4,597.20	ZAR		1.00	15.00	21/09/2016	Bianca Du Toit	Test custom r	N	A
QT0000	242	APP0001	Apple Juice Inc	Inni	t Validation				6			16	Bianca Du Toit	Test custom r	N	A
QT0000	080	YES001	Young Electric	mpe	it vanuation				0			16	Bianca Du Toit	Test custom r	N	A
QT0000	081	ERN0001	Ernser, White and	d C	_			Ľ				16	Bianca Du Toit	SP 19 19 machi	N	Α
QT0000	086	APP0001	Apple Juice Inc		2 Are y	ou sure	you want to	update th	is quo	te, no. QT(0000230 to t	De 16	Belinda Sharm		N	A
QT0000	087	BET0001	Betties Summer S	ha	Ansv	ver 'Yes'	to mark it as	Accepted				16	Belinda Sharm		N	Α
QT0000	084	DER001	Derton / Technolo	ogi								16	Bianca Du Toit	edit on custom	N	Α
QT0000	085	DER001	Derton / Technolo	ogi								16	Bianca Du Toit	test	N	Α
QT0000	089	HOP001	Hope Works (Pty)) L'	7			⊳ [2	es	No	16	Bianca Du Toit		N	Α
QT0000	088	HOP001	Hope Works (Pty)) Ltu			1,112.00	ZAR		1.00	14.00	02/11/2016	Bianca Du Toit		N	Α
QT0000	093	PAN001	Panda Copiers				550.00	USD		10.00	14.00	03/11/2016	Bianca Du Toit		N	Α
QT0000	090	HOP001	Hope Works (Pty)) Ltd			91,651.06	ZAR		1.00	14.00	03/11/2016	Bianca Du Toit		N	Α
QT0000	095	PAN001	Panda Copiers				800.00	USD		10.00	14.00	04/11/2016	Bianca Du Toit		N	Α
QT0000	094	PAN001	Panda Copiers				0.00	USD		10.00	14.00	04/11/2016	Bianca Du Toit		N	Α
QT0000	096	BOT0001	Bothas Networkin	ng inc			525.66	USD		10.00	14.00	10/11/2016	Bianca Du Toit	Test	Ν	Α
QT0000	097	BOT0001	Bothas Networkin	ng inc	test		60.01	USD		10.00	14.00	10/11/2016	Bianca Du Toit		N	Α
	000	100001	Hanna Mandan Pris. A	h i aul	OTOGOOOO	0	4 170 40	LICD		10.00	14.00	00/00/2017	A. data an ideas of		N.	

VIEW QUOTE IN ACCEPTED STATUS

1. You will return to the *Sales Quotes* listing screen.

Note that the quote that has been Accepted will no longer be available in the *New Quote* Status list.

- 2. Change the *Status* by clicking on the drop-down *arrow* to display the Status drop-down list.
- 3. Click on *Customer Accepted Quote*.



	₹ Home	Equipment /Loc	1 cations Contract Fin	Sales Qu	otes - BPO: V	ersion 2.4	iects Manufac	e Company	ocurement	Sales Service	Reporting	-	-
Add	Edit De	elete View	Forward Accepted	Rejected Convert	Clone Quote	Print Exp	port Save Lay	out Worksp	Dur haces Cus	ban 👻	Refresh		2
	Maintain	4	Navigati ,	Process	4	Print		Format	Stat	tus 🗰 StatusDes	ic .	1	
							3		L	Salesman Re	leased Quote	1º	
0	JoteReference	CustomerCode	CustomerName	OuoteDescription	OuoteValue	Currency	ExchangeRate	TaxRate	P OuoteDa D	Manager App Manager Dec	dined Quote	oteStatus	Stat.
	c	10c	× O :	A D C	-	n 🗖 c	-	-	- A	Customer Ac	cepted Quote	c	
Q	T0000046	DON0001	Dont Run with Scissors	test	19,726.54	ZAR	1.00	14.00	08/05/2 I	Invoiced Que	ected Quote		A
Q	T0000055	HOP001	Hope Works (Pty) Ltd	test	4,503.00	ZAR	1.00	14.00	04/09/2 ×			11.	A
Q	T0000065	HOP001	Hope Works (Pty) Ltd	test	549.12	ZAR	1.00	14.00	12/11/2015	Bianca Du Toit	test	A	Α
Q	T0000069	HOP001	Hope Works (Pty) Ltd	OR 589	20,978.85	ZAR	1.00	14.00	18/04/2016	Bianca Du Toit		A	Α
Q	T0000072	CUS001	Cash Sales Account		481.60	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	Α
Q	T0000071	DER001	Derton / Technologies	9876	88,263.56	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	Α
Q	T0000073	HOP001	Hope Works (Pty) Ltd	test	285.00	ZAR	1.00	14.00	09/06/2016	Bianca Du Toit		A	Α
Q	T0000074	BIG0001	Big Bargains	1234	570.00	ZAR	1.00	14.00	08/08/2016	Bianca Du Toit	1234	A	Α
Q	T0000077	BET0001	Betties Summer Shop at		581.96	ZAR	1.00	14.00	01/09/2016	Bianca Du Toit		A	Α
Q	T0000078	BIG0001	Big Bargains	test	481.60	ZAR	1.00	14.00	05/09/2016	Bianca Du Toit	test	A	Α
Q	T0000104	HOP001	Hope Works (Pty) Ltd	stdm	114.00	ZAR	1.00	14.00	17/02/2017	Judith Mudzengi		A	Α
Q	T0000132	HOP001	Hope Works (Pty) Ltd	Call - Labour	392.16	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	Α
Q	T0000141	HOP001	Hope Works (Pty) Ltd	Quotes - WO	493.62	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	Α
Q	T0000131	HOP001	Hope Works (Pty) Ltd	Quote - Calls	10,936.02	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	Α
Q	T0000198	APP0001	Apple Juice Inc	test	4,254.48	ZAR	1.00	14.00	06/11/2017	Bianca Du Toit		A	Α
Q	10000209	HOP001	Hope Works (Pty) Ltd	test	600.36	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit	test	A	A
Q	10000227	HEA0001	Healing Hands	test	0.00	ZAR	1.00	15.00	22/06/2018	Bianca Du Toit		A	A
Q	10000254	HOP001	Hope Works (Pty) Ltd	1234	9,489.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		A	A
Q	10000288	OFF001	Office Supplies Unlimited		14,317.50	ZAR	1.00	15.00	17/04/2020	Sne Ndwalane	test email	A	A
Q	T0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 Fr	3,450.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		A	A

 The *Sales Quotes* listing screen will be filtered using the *Customer Accepted* Status selection.

PROCESS ACTION BUTTONS

- 5. From this screen you can choose to;
 - <u>Reject</u> the Quote,
 - Convert to Order,
 - <u>Clone Quote</u>, or
 - Print a Quote



Home	Equipment / Lo	cations Contract Fin	ance / HR	Inventory	Mainte	enance / Projects	Manufacturin	g Pr	ocurement	Sales Service	Reporting	Utilities	_ d
Add Edit D	elete View	Forward Accepted	Rejected	Convert C	one	Print Export	Save Layout	Worksp	Durt	tomer Ac 🔻	Befresh		
							_		-			4	
Maintair	4	Navigati 🦼	Pro	0		0			. (?)	Current	4	-	
				C		n							
QuoteReference	CustomerCode	CustomerName	Quote	-			_			SalesmanName	Comments	QuoteStat	tus Status
10c	REC	* 0 ¢	-0	Rejecte	d (Convert	Clone		Print	* 0 ¢	RBC	8 🛛 C	* 0 ¢
QT0000046	DON0001	Dont Run with Scissors	test			Order	Ouote			Bianca Du Toit	test	A	A
QT0000069	HOP001	Hope Works (Pty) Ltd	OR 585	6	0,570.05	LAN	1.00	11.00	10/01/2010	Bianca Du Toit		A	A
QT0000209	HOP001	Hope Works (Pty) Ltd	test		600.36	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit	test	A	A
QT0000132	HOP001	Hope Works (Pty) Ltd	Call - La	bour	392.16	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	A
QT0000072	CUS001	Cash Sales Account			481.60	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	A
QT0000078	BIG0001	Big Bargains	test		481.60	ZAR	1.00	14.00	05/09/2016	Bianca Du Toit	test	A	A
QT0000055	HOP001	Hope Works (Pty) Ltd	test		4,503.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm		Α	Α
QT0000304	HOP001	Hope Works (Pty) Ltd	Test Ma	rc 03 Fr	3,450.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		A	A
QT0000198	APP0001	Apple Juice Inc	test		4,254.48	ZAR	1.00	14.00	06/11/2017	Bianca Du Toit		A	A
QT0000141	HOP001	Hope Works (Pty) Ltd	Quotes	- WO	493.62	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		Α	A
QT0000227	HEA0001	Healing Hands	test		0.00	ZAR	1.00	15.00	22/06/2018	Bianca Du Toit		A	A
QT0000104	HOP001	Hope Works (Pty) Ltd	stdm		114.00	ZAR	1.00	14.00	17/02/2017	Judith Mudzeng	í	Α	Α
QT0000288	OFF001	Office Supplies Unlimited		1	4,317.50	ZAR	1.00	15.00	17/04/2020	Sne Ndwalane	test email	A	A
QT000065	HOP001	Hope Works (Pty) Ltd	test		549.12	ZAR	1.00	14.00	12/11/2015	Bianca Du Toit	test	A	A
QT0000073	HOP001	Hope Works (Pty) Ltd	test		285.00	ZAR	1.00	14.00	09/06/2016	Bianca Du Toit		A	A
QT0000254	HOP001	Hope Works (Pty) Ltd	1234		9,489.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		A	A
QT0000071	DER001	Derton / Technologies	9876	8	8,263.56	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		Α	A
QT0000077	BET0001	Betties Summer Shop at			581.96	ZAR	1.00	14.00	01/09/2016	Bianca Du Toit		Α	A
	BIG0001	Big Bargains	1234		570.00	ZAR	1.00	14.00	08/08/2016	Bianca Du Toit	1234	Α	A
QT0000074					0 036 02	740	1.00	14 00	25/05/2017	Bianca Du Toit		٨	Δ

MNU.062.009

Help v2.5.0.14 - Pg 5 - Printed: 25/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential