

SERVICE

MY WORK – ADD A QUOTE

You may need to raise a quote for additional work that must be done, but needs approval from the client, as it will be billed.

When using the **Email** option to send a Sales Quote, please note that it will be mailed via the **BPO Email Service** on the server (not from your own MS Outlook).

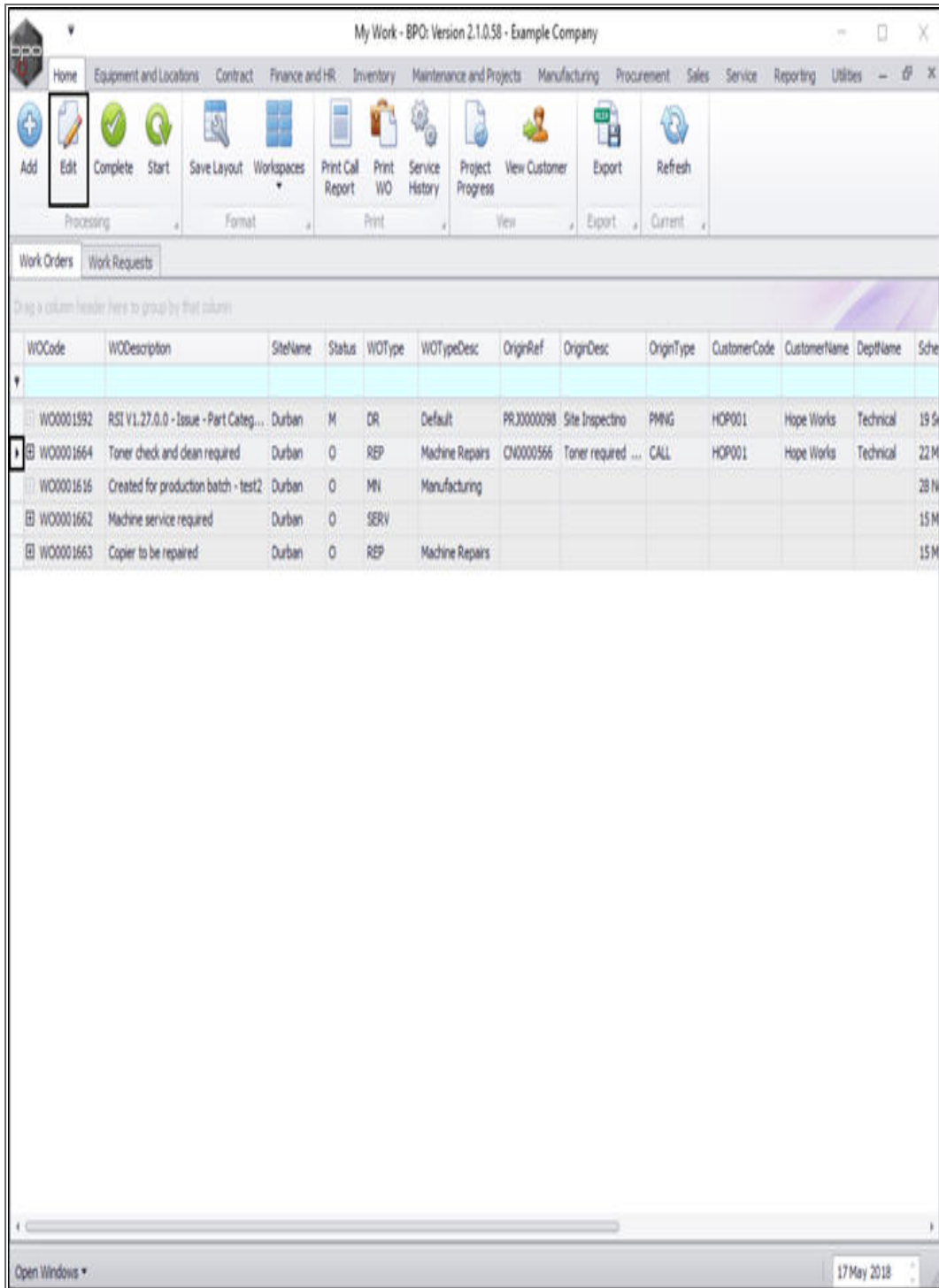
***Ribbon Access:** Service > My Work*



The **My Work** listing screen will be displayed.

ADD A QUOTE

- Click on the *row selector* in front of the *work order* where you wish to *raise a quote*.
- Click on *Edit*.



The **Maintain WO - Ref []** screen will be displayed.

- Click on the **Quotes** tile.

Maintain WO - Ref W00001664 - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Print

Maintain | Format | Print

Links

Enter text to search...

Images

Work in Progress

Maintenance

Processing

Quotes

Orders

Invoices

Credit Notes

Description Toner check and clean required

Requestor Abigail Milne

WO Type Repair

Priority 2

Request Date 18 May 2018 09:42:59

Status Open

Billable

Capitalise

Work Order Item

Functional Location **Equipment**

Item 2020-103053

Comment Check Colour Toner - not printing effectively

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	00000566
PMNG	Project Reference	

Schedule:

Assigned To Abigail Milne

Assigned By Abigail Milne

Scheduled Start 22 May 2018 00:00:00

Scheduled End 22 May 2018 02:00:00

Actual Start 17 Jun 2018 00:00:00

Actual End 17 Jun 2018 00:00:00

Delay Comments Currently on Schedule

Rectification Code

Rectification Comments

Completion Date 17 Jun 2018 00:00:00

Meters

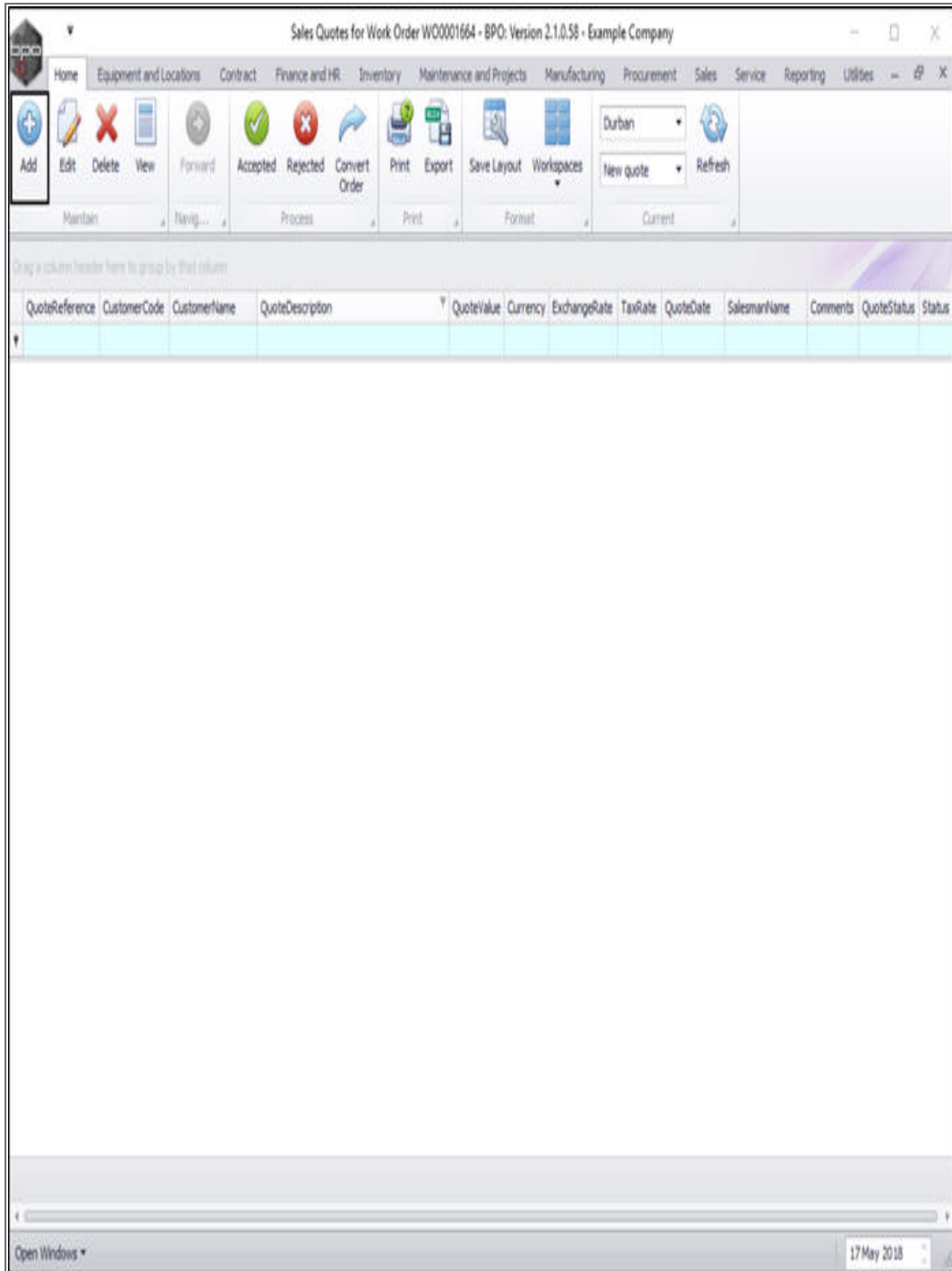
Open Windows

17 May 2018

The *Sales Quotes for Work Order []* listing screen will be displayed.

If there were already sales quotes linked to this work order, they would be listed here.

- Click on **Add**.



The *Add new Customer Quote* screen will be displayed.

QUOTE HEADER DETAILS

- **Customer Name:** This will auto populate with the name of the customer linked to this work order.
- **Contact Name:** Click on the search button and select a contact from the *Select a contact for this quote* pop up screen.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required.
- **Salesman:** This will auto populate with the person currently logged on to the system but you can click on the search button and select an alternative salesman if required.
- **Reference:** Type in a reference for the quote.
- **Status:** This will auto populate as *New quote*.
- **Date and Time:** These will auto populate with the current date and time.
 - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
 - **Time:** You can either type in or use the arrow indicators to select an alternative time if required.

Add new Customer Quote - BPC: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Apply Sales Template | Apply Project Methodology | Delete Item | Save Layout | Print

Customer Name	Hope Works	Reference		RefType	ReferenceType	ReferenceNo
Contact Name		Status	New quote	I	ASPN	Serial No 2020-103053
Commercial	Default	Date & Time	21 May 2018 13:21:14		CALL	Call Reference
Salesman	Abigail Mine				CASE	Case
Currency	South African Rand	Exchange Rate	1		CTRT	Contract No C00000043
Tax Rate	15.00				PNLC	Location
					PMNG	Project Reference

SuppressOrPrint	QuoteItemT...	ItemCode	QuoteItemDescription	WarehouseName	Quan...	QuantityPerUCP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
	Select type...													

Comment

Sub Total	0.00
VAT	0.00
Grand Total	0.00

Open Windows | 21 May 2018

QUOTE FINANCIAL DETAILS

- **Currency:** This will populate with the currency set up on the customer. Use the drop-down arrow to display the currency menu and select an alternative currency if required.
- **Tax Rate:** This will populate with the tax rate set up on the customer. Click on the search button and select a new rate if required.
- **Exchange Rate:** This will populate based on the currency set up in the system. Type in or use the directional arrows to select a new exchange rate if required.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Apply Sales Template | Apply Project Methodology | Delete Item | Save Layout | Print

Customer Name: Hope Works

Contact Name: Julia Ritson

Commercial: Default

Salesman: Abigail Mine

Currency: South African Rand

Tax Rate: 15.00

Reference: HW Q-0123

Status: New quote

Date & Time: 21 May 2018 13:21:14

Exchange Rate: 1

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	2020-103053
CALL	Call Reference	
CASE	Case	
CTRT	Contract No	CO0000043
FINC	Location	
PMNG	Project Reference	

Suppress/Print	QuoteItem Type	Item Code	QuoteItem Description	Warehouse Name	Quantity	Quantity Per UOP	Unit Type	Unit Cost	Markup	Discount	Item Price	Base Ccy Price	Tax Rate	Status
	Select type...													

Comment:

Sub Total: 0.00

VAT: 0.00

Grand Total: 0.00

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CROSS REFERENCE INFORMATION

- In the **References** frame you can see that this quote is linked to a **Serial Number** and a **Contract Number**.
- **Scroll down** in this References frame.

- You can now view the linked **work order number** that you initially selected when you began this '**raise a quote**' process.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Apply Sales Template | Apply Project Methodology | Delete Item | Save Layout | Print

Customer Name Hope Works

Contact Name Julia Ritson

Commercial Default

Salesman Abigail Mine

Currency South African Rand

Tax Rate 15.00

Reference HW Q-0123

Status New quote

Date & Time 21 May 2018 13:21:14

Exchange Rate

RefType	ReferenceType	ReferenceNo
CASE	Case	
CTRT	Contract No	CO0000043
PNLC	Location	
PMNG	Project Reference	
WKOR	Work Order Reference	WO0001664

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCryPrice	TaxRate	Status
<input type="checkbox"/>														
<input type="checkbox"/>	Select type...													

Comment

Sub Total 0.00

VAT 0.00

Grand Total 0.00

Open Windows | 21 May 2018

ADD QUOTE ITEM DETAILS

- Follow the process in [Add New Customer Quote](#) to add the quote item details as required.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company
⌵ □ ✕

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

Save Back Apply Sales Template Apply Project Methodology Delete Item Save Layout Print

Maintain Format Print

Customer Name Hope Works ⌵ ⌵ **Reference** HW Q-0123 ⌵

Contact Name Julia Ritson ⌵ ⌵ **Status** New quote ⌵

Commercial Default ⌵ ⌵ **Date & Time** 21 May 2018 ⌵ 13:21:14 ⌵

Salesman Abigail Mine ⌵ ⌵

Currency South African Rand ⌵ ⌵ **Exchange Rate** 1 ⌵

Tax Rate 15.00 ⌵ ⌵

RefType	ReferenceType	ReferenceNo
CASE	Case	
CTRT	Contract No	CO0000043
PNLC	Location	
PNNG	Project Reference	
WKOR	Work Order Reference	WO0001664

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
<input type="checkbox"/>	Parts	19-687	Drum	Main Warehouse	1.00	0.00		1,000.00	0.00	0.00	1,200.00	1,200.00	15.00	A
<input type="checkbox"/>	Select type...													

Comment

Sub Total 1,200.00

VAT 180.00

Grand Total 1,380.00

Open Windows
21 May 2018

COMMENTS

- Click in this text box and type in a ***comment*** for this quote. This comment will appear on the ***quote document***.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Apply Sales Template | Apply Project Methodology | Delete Item | Save Layout | Print

Customer Name: Hope Works | Reference: HW Q-0123 | RefType: CASE | ReferenceType: Case | ReferenceNo: |
 Contact Name: Julia Ritson | Status: New quote | CTRT: Contract No | C00000043 |
 Commercial: Default | Date & Time: 21 May 2018 13:21:14 | PNL: Location |
 Salesman: Abigail Mine | Exchange Rate: 1 | PNRG: Project Reference |
 Currency: South African Rand | WKOR: Work Order Reference | W00001664 |
 Tax Rate: 15.00

SuppressOnPrint	QuoteItem Type	Item Code	QuoteItem Description	Warehouse Name	Quantity	Quantity Per UOP	Unit Type	Unit Cost	Markup	Discount	Item Price	Base Ccy Price	Tax Rate	Status
<input type="checkbox"/>	Parts	19-687	Drum	Main Warehouse	1.00	0.00		1,000.00	0.00	0.00	1,200.00	1,200.00	15.00	A
<input type="checkbox"/>	Select type...													

Comment:

Sub Total: 1,200.00
 VAT: 180.00
 Grand Total: 1,380.00

Open Windows | 21 May 2018

SAVE QUOTE

- When you have finished adding the quote details, click on **Save**.

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company

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

Save Back Apply Sales Template Apply Project Methodology Delete Item Save Layout Print

Customer Name: Hope Works ρ Reference: HW Q-0123 ρ
 Contact Name: Julia Ritson ρ Status: New quote ρ
 Commercial: Default ρ Date & Time: 21 May 2018 13:21:14 ρ
 Salesman: Abigail Mine ρ
 Currency: South African Rand ρ Exchange Rate: 1 ρ
 Tax Rate: 15.00 ρ

RefType	ReferenceType	ReferenceNo
CASE	Case	
CTRT	Contract No	CO0000043
PNLC	Location	
PMNG	Project Reference	
WKOR	Work Order Reference	WO0001664

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCryPrice	TaxRate	Status
<input type="checkbox"/>	Parts	19-687 ...	Drum	Main Warehouse	1.00	0.00		1,000.00	0.00	0.00	1,200.00	1,200.00	15.00	A
<input type="checkbox"/>	Select type...													

Comment: New drum required.

Sub Total	1,200.00
VAT	180.00
Grand Total	1,380.00

Open Windows 21 May 2018

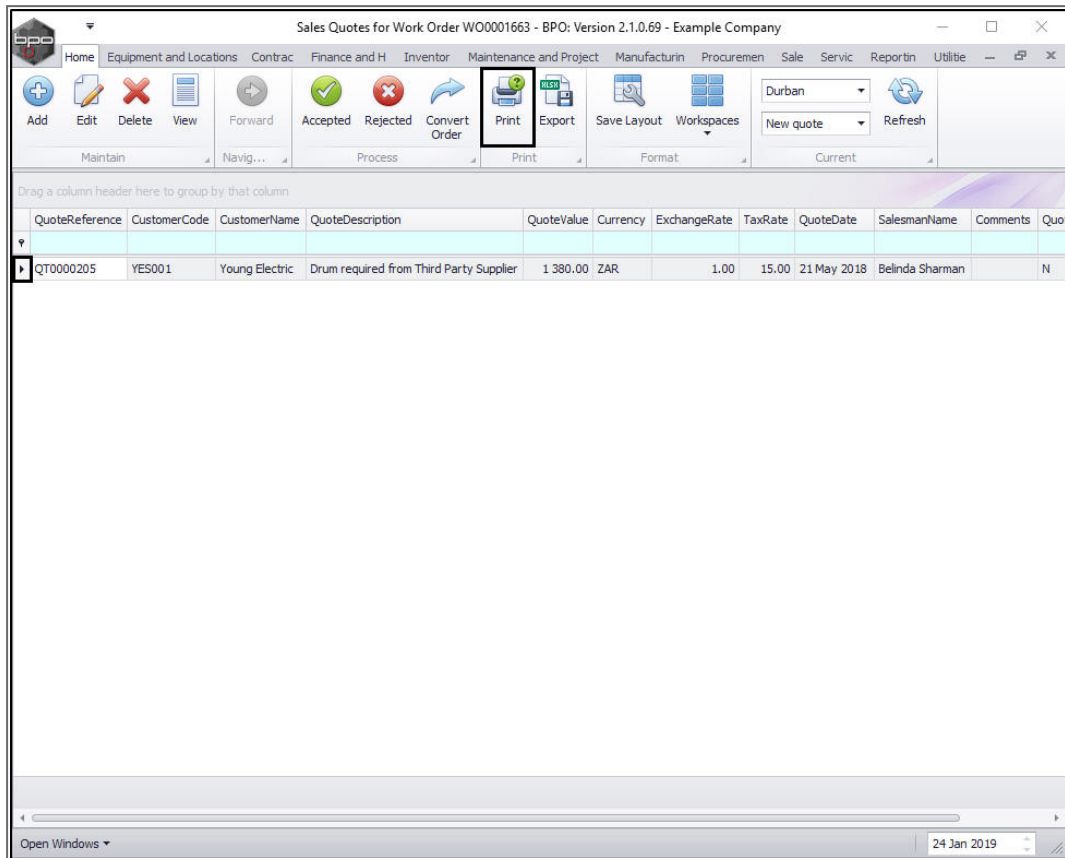
- The new customer quote information will be **saved** and you will return to the **Sales Quotes for Work Order []** listing screen.
- Here you can now view the newly created sales quote details.

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000206	HOP001	Hope Works	HW Q-0123	1 380.00	ZAR	1.00	15.00	21 May 2018	Abigal Mine	New drum required.	N	A

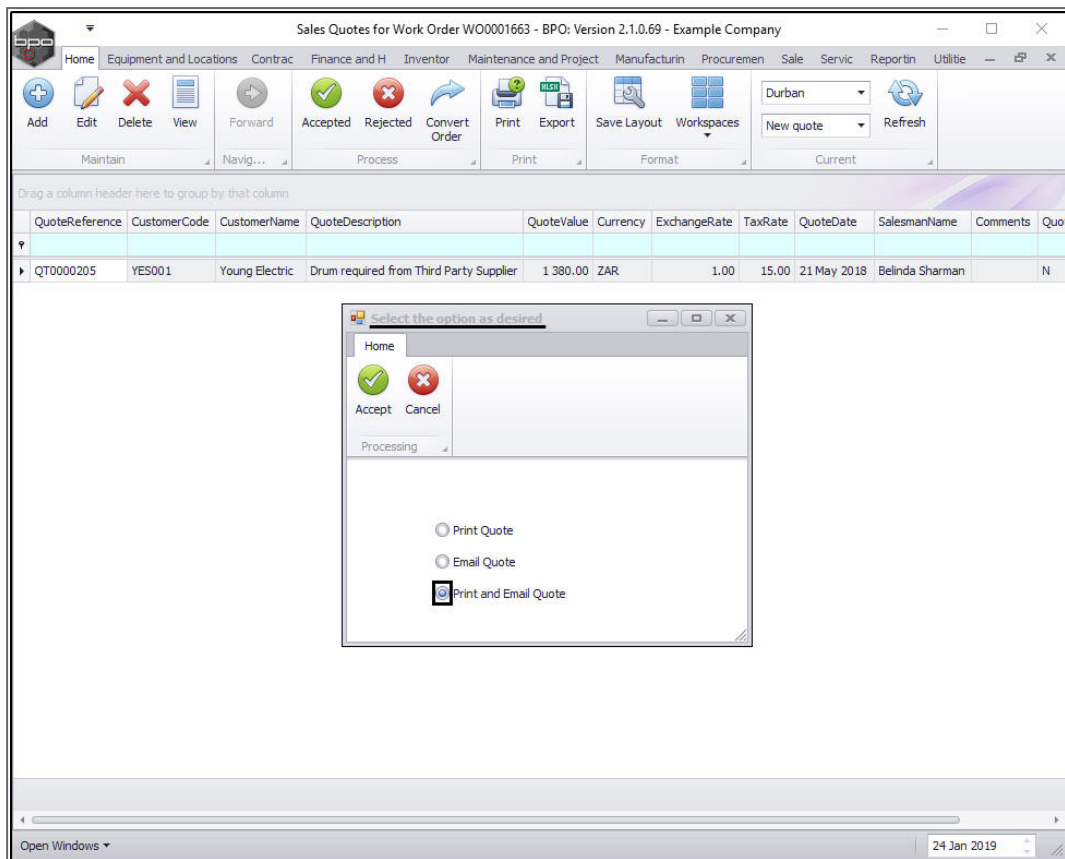
PRINT, EMAIL QUOTE

In the Sales Quotes for Work Order [] listing screen,

- Click on the **row selector** in front of the **quote**.
- Click on **Print**.

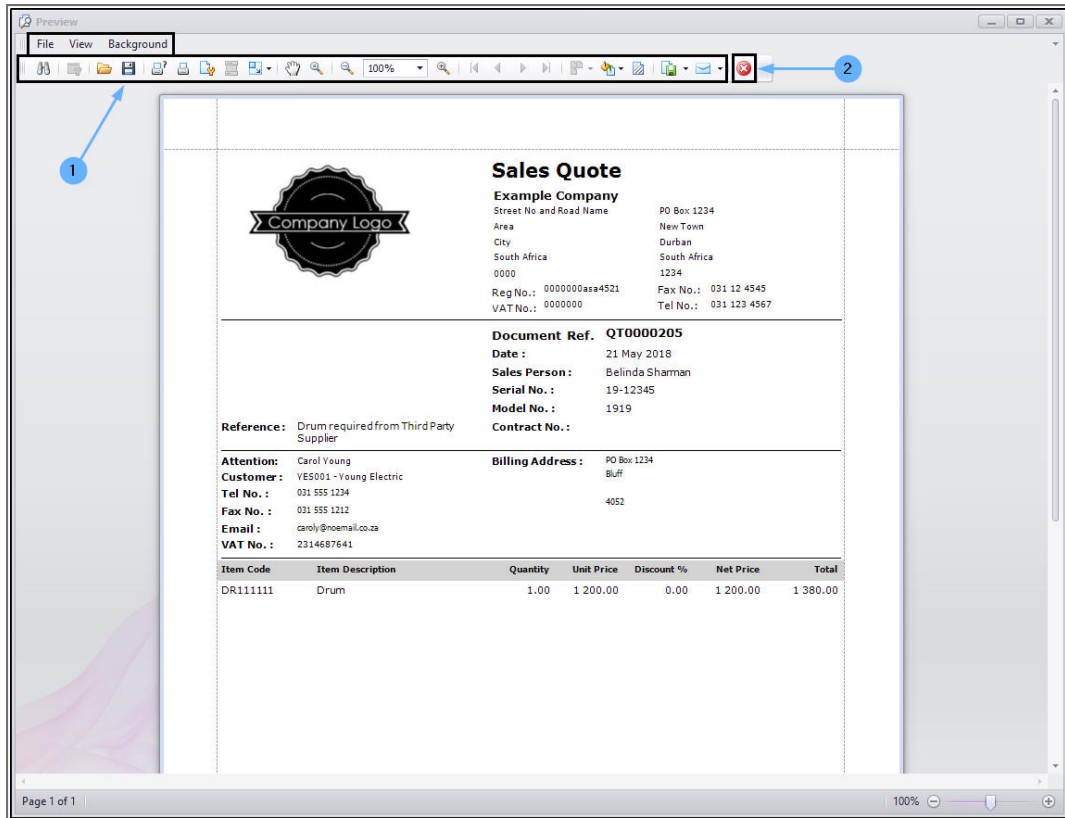


- A **Select the option as desired** pop up menu will appear with **Print** and **Email** choices.
- Click on the **radio button** in front of your selected option.
 - In this example, **Print and Email Quote** has been selected.
- Click on **Accept**.



The **Report Preview** screen will be displayed.

1. From here you can **View, Print, Export** or **Email** the Sales Quote.
2. **Close** this screen when you are done.

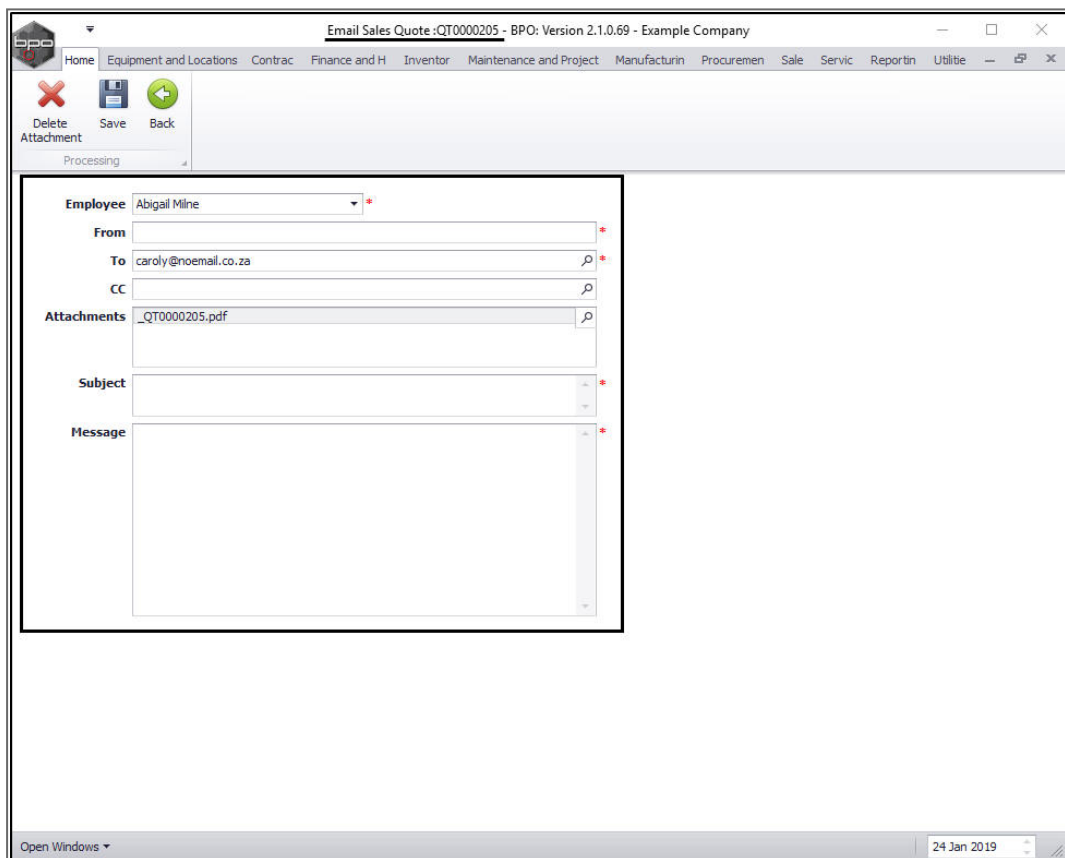


As the Report Preview screen is closed the **Email Sales Quote: []** screen will be displayed.

- **Employee:** This will populate with the employee who is currently logged on to the system. You can click on the drop-down arrow and select an alternative employee, if required.
- **From:** Type in the email address of the employee above.
- **To:** This will populate with the email address of the Customer Contact selected on the Quote (the accounts person will be always added to this). You can also type in an additional email address (separated by a semi-colon), or click on the search button and select

from the pop up screen, an additional customer contact(s).

- **CC:** If a group email address has been set up on the quote or accounts contact, that will pull through here. You can also type in an additional email address (separated by a semi-colon), or click on the search button and select from the pop up screen, an additional customer contact(s).
- **Attachments:** BPO will create a PDF of the quote and attach it automatically. (You can also attach additional documentation by clicking on the search button and browsing for the file you wish to attach.)
- **Subject:** Type in the email subject.
- **Message:** Type in a message regarding the email.

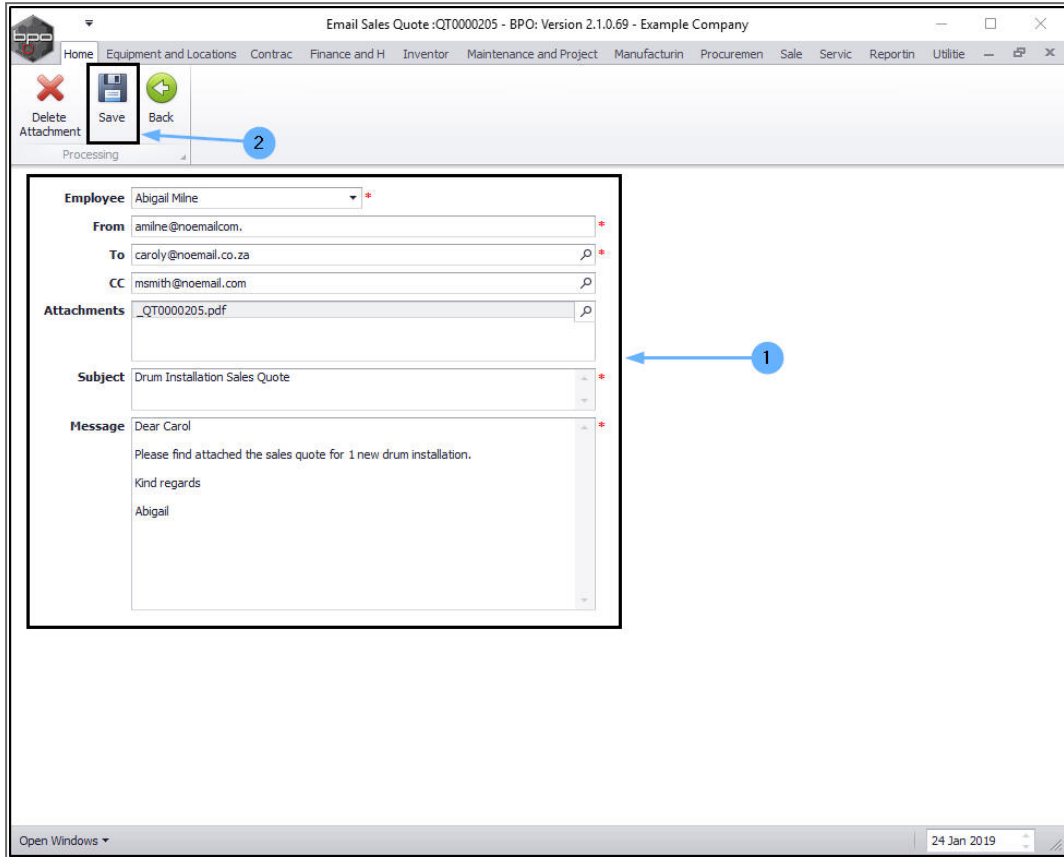


The screenshot shows a software window titled "Email Sales Quote :QT0000205 - BPO: Version 2.1.0.69 - Example Company". The window has a menu bar with options: Home, Equipment and Locations, Contract, Finance and H, Inventor, Maintenance and Project, Manufacturin, Procuremen, Sale, Servic, Reportin, Utilitie. Below the menu bar is a toolbar with icons for "Delete Attachment", "Save", and "Back". A "Processing" indicator is visible below the toolbar. The main form area contains the following fields:

- Employee:** A dropdown menu with "Abigail Milne" selected.
- From:** An empty text field.
- To:** A text field containing "caroly@noemail.co.za".
- CC:** An empty text field.
- Attachments:** A list box containing "_QT0000205.pdf".
- Subject:** An empty text field.
- Message:** A large empty text area.

At the bottom of the window, there is a status bar with "Open Windows" on the left and "24 Jan 2019" on the right.

1. When you have added all the required details to this screen,
2. click on **Save**.



- The email will be sent from the **server** and you will return to the **Sales Quotes for Work Order []** listing screen.

Sales Quotes for Work Order WO0001663 - BPO: Version 2.1.0.69 - Example Company

Home | Equipment and Locations | Contract | Finance and H | Inventor | Maintenance and Project | Manufacturin | Procuremen | Sale | Servic | Reportin | Utilitie

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

Maintain | Navig... | 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	Quo
X QT0000205	YES001	Young Electric	Drum required from Third Party Supplier	1 380.00	ZAR	1.00	15.00	21 May 2018	Belinda Sharman		N

Open Windows ▾ | 24 Jan 2019

Related Topics

Once the client has approved the quote, it can be processed further:

[Convert to Sales Order](#)

[Add Items to WO](#)

MNU.073.014

