# SALES STUDIO CONFIGURATION

## VIEW QUOTE DEFAULT ITEMS

**Default items** are items that are premeditatedly 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 preconfigured items pull through to each new quote, any or even all of these items can be individually ***removed*** from each quote or ***edited***, if required.

Follow the process below to ***view*** current linked quote default items.

***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 ***Default Items*** frame on the right of the screen.

### VIEW CURRENTLY LINKED QUOTE DEFAULT ITEMS

3. The ***Default Items*** frame, contains items that have already been linked and will appear on each new Sales Quote.

4. In this example, A ***Inspection*** fee, a ***Consulting*** fee and an ***Installation Charges*** fee have already been set up to link to each new quote.
5. Click on ***Back*** to return to the Sales Studio landing page.

## VIEW CURRENT DEFAULT ITEMS ON A NEW SALES QUOTE

1. In the Sales Studio landing page,
2. select ***Sales*** > ***Quotes***.

1. The ***Sales Quotes*** listing screen will be displayed.
2. Click on the drop-down arrow and select from the menu, the correct ***site***.

1. As the selected site populates the ***Site*** field,
2. the ***Quotes data grid*** will populate with all the quotes linked to that site.
3. Click on ***Add***.

1. The ***Add new Customer Quote*** screen will open.
2. You will note that no Quote Default Items currently populate the Items frame. If there are any Default Items set up, they will only display when a customer is selected.
3. Click on the lookup icon in the ***Customer Name*** field.

1. The ***Select a customer for this quote*** screen will pop up.
2. Select the customer.
3. Click on ***Ok***.

1. As the selected customer details populate the ***Customer*** frame,
2. the ***Items*** frame will auto populate with the items that were set up in the Quote Default Items screen (image 2). These items can be edited or deleted from this screen.
3. You will note that the title of the screen changed to ***Edit Customer Quote*** and the selected ***customer's name*** can now be viewed.
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.

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