SALES STUDIO CONFIGURATION

ADD QUOTE DEFAULT ITEMS

Default items are items that are 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 items pull through to each new quote, each item can be individually ***removed*** from each quote or ***edited***, if required.

Follow the process below to ***add*** quote default items.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

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

3. ***Default Items*** frame, on the right of the screen. This frame, contains items that have already been linked and will appear on each new Sales Quote.
4. In this example, an ***Inspection*** fee, a ***Consulting*** fee and an ***Installation Charges*** fee have already been set up to link to each new quote.

SELECT THE ITEM TYPE

5. In the Item Selector frame, click anywhere in the ***Item Type*** field.

SELECT ITEM TYPE

1. The ***Add Item*** menu will pop up.
2. Select from the list, the required ***Item Type***.
    - In this example, ***Internal Service*** is selected.

SELECT ITEM TO ADD TO THE QUOTE

1. The ***Item Selector*** frame will populate with a data grid of all the items linked to the selected ***Item Type***.
2. Select the required item and either,
    i. ***Double click*** in the item row or,
    ii. ***Drag*** and ***drop*** the selected item into the ***Default Items*** frame.
        - In this example, ***Delivery Fee*** is selected.

ADJUST ITEM QUANTITY

1. You will see the selected item is now added to the data grid in the ***Default Items*** frame.
2. Click in the ***Quantity*** column to display directional arrows. You can either,
   i. ***Type in*** or
   ii. Use the directional ***arrows*** to select an alternative quantity, if required.

SAVE ADDED DEFAULT ITEMS

3. When you have added all the required items to the Default Items frame, click on ***Save***.

1. A ***Quote Configuration*** message box will pop up informing you;
   - ***Default items saved successfully.***
2. Click on ***OK***.

VIEW ADDED DEFAULT ITEM ON A SALES QUOTE

1. Click on the ***Sales*** ribbon tab.
2. The screen will refresh to display the ***Quotes*** toolbar button, click on this button.

1. The ***Sales Quotes*** listing screen will open.
2. Click on the drop-down arrow in the ***Site*** field and select from the list, the applicable site.

3. Upon opening this screen, the ***Status*** field auto populates with ***'New Quote'.*** You can click on the drop-down ***arrow*** in this field and select an alternative status from the list that will appear. For the purpose of this manual, the status will remain as ***New Quote***.

1. Once you have selected the site,
2. the data grid will populate with all the ***New Quotes*** linked to that specific site.
3. Click on ***Add***.

1. The ***Add new Customer Quote*** screen will open.
2. You will note that the ***Items*** frame does not yet contain any item details.
3. A customer needs to be selected before the default items will populate this frame. Click on the ***search*** icon in the ***Customer Name*** field.

1. The '***Select a customer for this quote***' screen will pop up.
2. Select the ***row*** of the customer that you wish to view.
3. Click on ***Ok***.

1. As the selected customer details populate the ***Customer*** frame,
2. the ***Items*** frame will populate with all the Default Quote Items as listed in the Quote Default Items screen.
3. You will note that the *recently added* default item (image 5) also appears here.

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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