SALES STUDIO CONFIGURATION

EDIT QUOTE DEFAULT ITEMS

(from the '**Quote Default Items**' screen)

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.

There are 2 ways to edit these default items:

i. From the '**Quote Default Items**' screen, where only the *Quantity* can be edited.
ii. From the '**Add**' or '**Edit Customer Quote**' screens where you can edit the *Quote Item Description*, *Quantity*, *Discount* and *Item Price*.

The following process will set out (i) - how to ***edit*** a quote default item from the ***Quote Default Items*** screen.

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, an ***Installation Charges*** fee and a ***Delivery Fee*** have been set up to link to each new quote.

SELECT ITEM TO BE EDITED

1. Click in the ***Quantity*** column of the Item that you wish to edit.
2. Directional ***arrows*** will appear.
3. Either ***type*** directly in the field, or use these ***arrows*** to update the number.

SAVE EDITED DETAILS

1. When you have finished editing the Item quantity,
2. Click on ***Save***.

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

2. Click on ***Ok***.

VIEW EDITED 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 edited default item (images 3 and 4) now displays the ***Quantity*** amount as ***2***.
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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