SALES

INTRODUCTION TO QUOTES

This manual will give you an overview of the Sales Quotes screen and its related functionality.

A Sales Quote allows a customer to see the costs that will be involved for desired work or parts required. Upon customer approval, the quote can be converted into a Sales Order and then processed as either a POS Sale, New Deal Sale or New Deal Rental. Where additional work or parts are required on a current service call or project, the quote items will be added to the call or project work order to process.

Sales Quotes can be created in **Nucleus Service**, **CRM** and **Sales Studio**.

- If created in **CRM**, the Quote will need to be accepted by the customer before the quote will be active and available for editing in **Nucleus Service**.
- If created in **Sales Studio**, the Quote can only be **Viewed** and any **changes** to the Quote must be done via **Sales Studio** due to the additional information that can be linked.
- Once the Quotes have been approved in either **CRM** or **Sales Studio**, the remainder of the sales process will be done in **Nucleus Service**.

Note the following:

- You must have a customer set up in order to create a quote.
- Quotes can be raised against customers on hold. The System Validation will prevent the creation of a Sales Order until the Customer has been released from hold.

- If the items on a quote are ordered on a regular basis by a customer then the <u>quote can be cloned</u> to save time and ensure continuity.
- The use of **Sales Templates** is not supported in **Nucleus Service**, as **Sales Studio** has an improved template functionality. Sales Templates can be applied to Quotes in **CRM** only where Sales Studio does not exist.
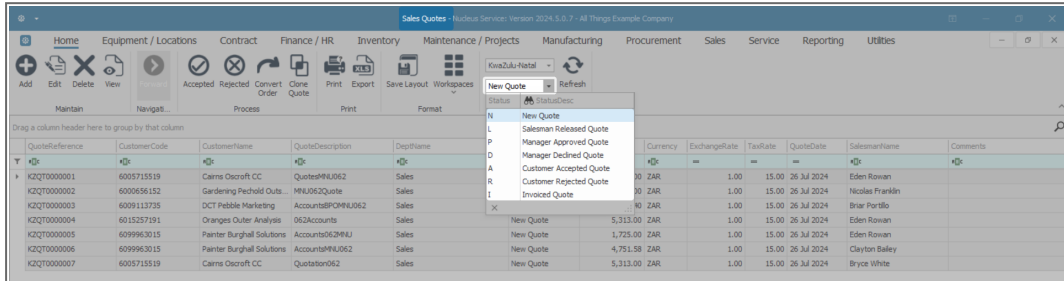
Ribbon Select **Sales > Quotes**
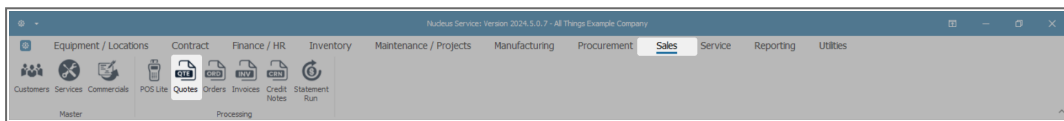
- The **Sales Quotes** listing screen will be displayed.
- The list of all the Sales Quotes will be filtered using the **Site** and **Status** selected.

SALES QUOTE STATUS

- The **Sales Quotes** listing screen opens in the **N - New Quote** Status by default.
- Click on the Status **drop-down arrow** to display the **Status** selection options:
  - L - Salesman Released Quote
  - P - Manager Approved Quote

- **D - Manager Declined Quote**
- **A - Customer Accepted Quote**
- **R - Customer Rejected Quote**
- **I - Invoiced Quote**

RIBBON TOOL BAR

The Sales Quote ribbon action buttons will be available (**bold**) or unavailable (greyed out) depending on the status selection.

QUOTES MAINTAIN BUTTONS

- From the Maintain ribbon section you can choose to <u>Add</u>, <u>Edit</u>, <u>Delete</u> or <u>View</u> a Sales Quote.
- Note that the <u>Forward</u> button is greyed out in the **New Quote** Status and can be accessed when the Status is set to **Quote Invoiced**. This gives you the ability to navigate to the invoice created at the end of this sales process.
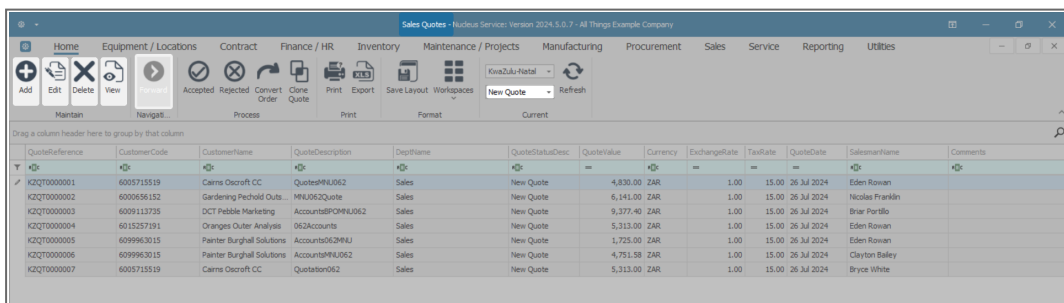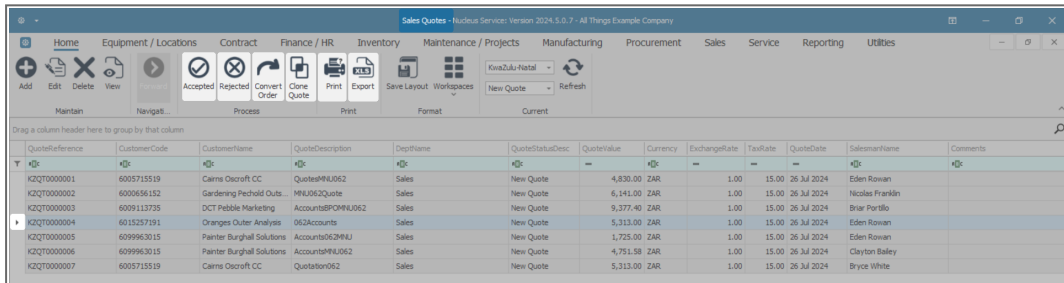
QUOTES PROCESS BUTTONS

- On the Process ribbon section you can have Quote <u>Accepted</u> or <u>Rejected</u> buttons.
- You can also <u>Convert Order</u> and <u>Clone Quote</u>.

PRINT SALES QUOTE

- From the Print ribbon section you can:
    - <u>Print</u> a Sales Quote.
   - **Export** the Sales Quote listing screen in its current Status to an Excel spreadsheet.

SALES QUOTE LISTING SCREEN

USING FILTERS

For the purpose of this example, the list of **Customer Accepted** Sales Quotes has been filtered using the Quote Date.

- Change the **Status** to **Customer Accepted Quote**.
    - The Sales Listing screen will display only Sales Quotes with a QuoteStatus [A].
- Click on the filter next to **QuoteDate** to display the **Date Filters** selection box.

- Click in the tick box(es) to choose the date(s) you wish to list.
    - The example has 'This Month' selected.
    - Note that the Sales listing screen updated with the Sales Quotes from This Month only.
- Click **Clear Filter** to reset the Listing Screen or click **Close** to continue to the Sales Quotes listing screen with the current filter setting.
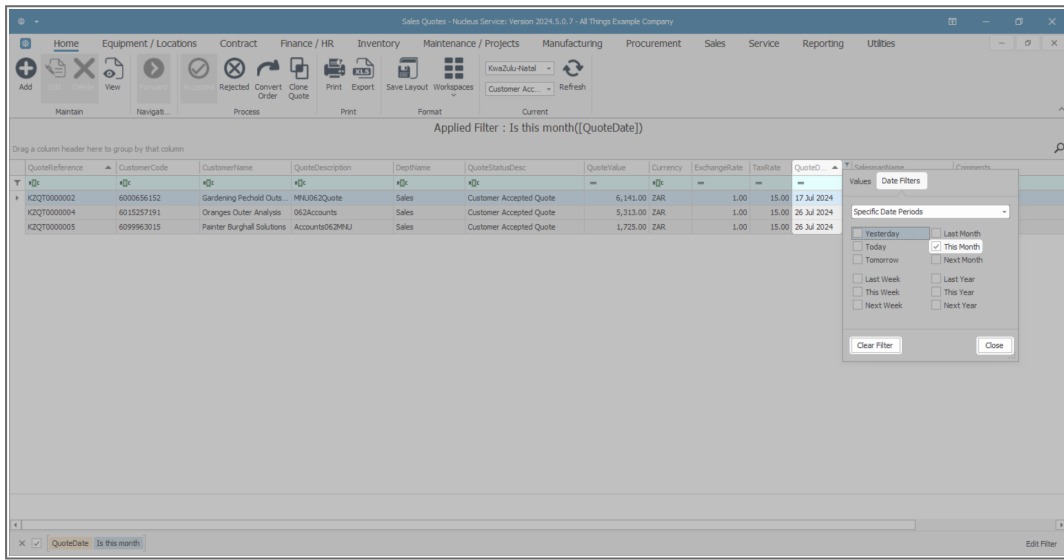
- Click on the **Values** Tab on the Date Filter screen to display a date summary of the Sales Quotes that have been Accepted by Year and Month.
- Click in the tick box(es) next to the Year and Month(s) you would like to list.
    - The example has the year **2023** and the months of **November and December** selected.
- Click on **Clear Filter** to reset the listing screen or **Close** to continue with the current filter setting.

> ✎ **Note** that the listing screen has updated with your date selection.
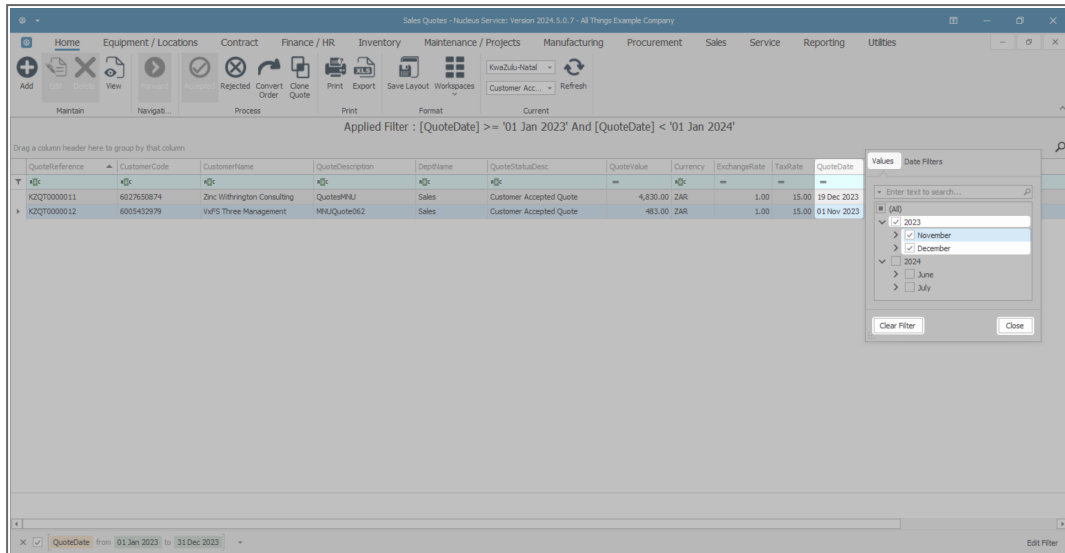
- **Close** the screen when you are done.

Related Topics

- [Add Quote](#)
- [Edit Quote](#)
- [Delete Quote](#)
- [View Quote](#)
- [Accept and Reject a Quote](#)
- [Print and Export a Sales Quote](#)
- [Forward Navigation](#)
- [Apply Project Methodology](#)
- [Clone a Quote](#)
- [Export a Quote](#)
- [Generate a Sales Order](#)
- [Creating a Quote from a Call](#)
- [Creating a Quote from a Project](#)
- [Link Quote Items to a Work Order](#)
- [CRM Basics - Quotes](#)
- [View Quote in CRM](#)
- [Add new Quote in Sales Studio](#)

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