

SALES

QUOTES - ADD SALES QUOTE

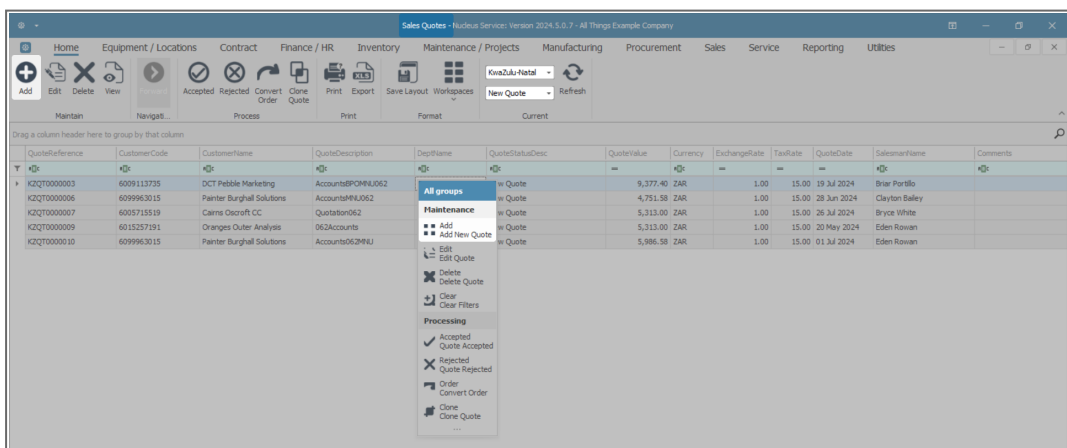
Ribbon Select Sales > Quotes



- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** where the quote needs to be created.
 - The example has **KwaZulu-Natal** selected.
- The **Sales Quotes** listing screen opens in the **N - New Quote** Status by default. You can Create a Quote in any Status.
 - The example has **New Quote** selected and will list all the **N - New Quotes** in the Quotes listing screen.
- Click on **Add**.



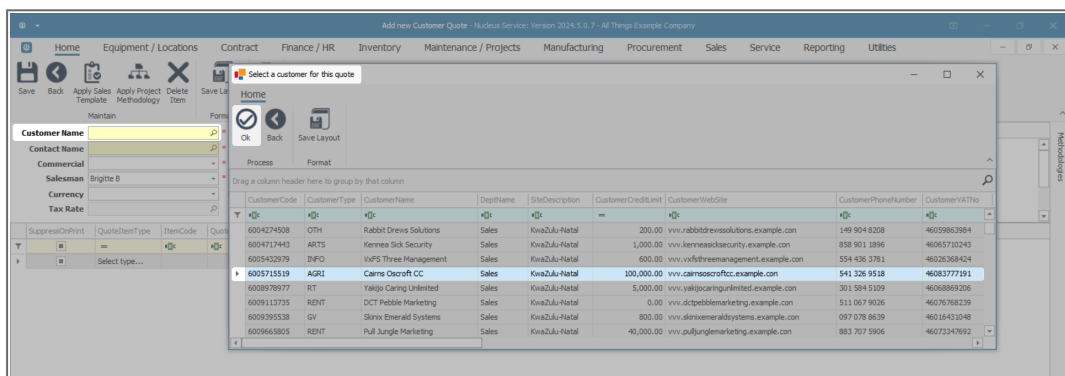
Short cut key: Right click on a row in the data grid to display the **Process** menu list. Click on **Add**.



- The **Add new Customer Quote** screen will display.

QUOTE HEADER

- **Customer Name:**
 - Click on the **search** button to display the **Select a customer for this quote** screen.
 - Click on the **row** of the Customer you are creating the quote for.
 - Click on **OK**.



- **Contact Name:** Click on the **search** button to select the contact person at the company from the **contact for this quote** screen, following the three steps above.
- **Commercial¹:** The commercial linked to the selected customer will auto populate the commercial field, but a different commercial can be selected, if required.
- **Salesman:** This field will auto populate with the sales representative currently logged on to the system and the person who is responsible for this quote. Click on the **search** button and select an alternative sales representative, if required.

¹Commercial is the mark up structure for the item. The original price of the item, including the company profit margin



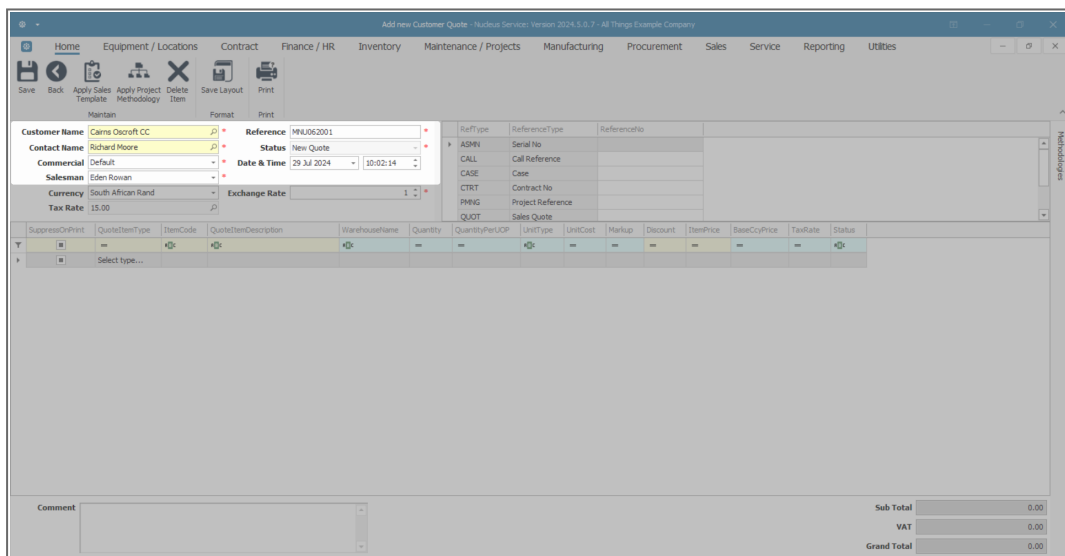
This is an important record for commission purposes.

- **Reference:** Type in a reference for the quote.



Note that the reference is for internal use and is very important to find and identify the quote, once it has been processed.

- **Status:** This field will default to '**New Quote**' and cannot be changed. (Note that the field has been **greyed out**.)
- **Date & Time:** Date and time will display the **current date and time**.
 - To change the date, type an alternative date or click on the **drop-down arrow** to select the date using the calendar function.
 - To change the time, type or use the directional **arrows** to select an alternative time.

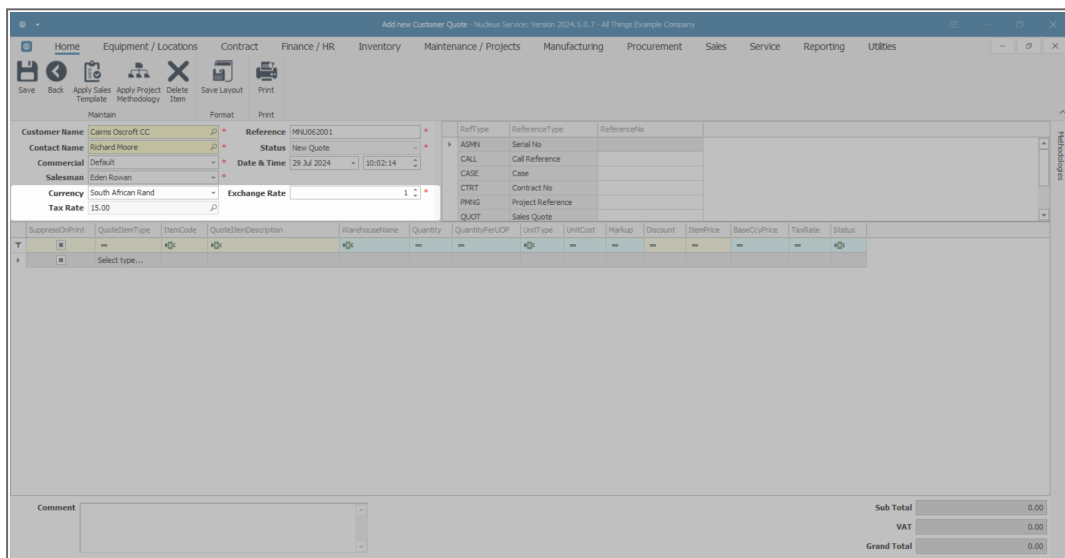


Suppress/Print	QuoteItem Type	Item Code	QuoteItem Description	Warehouse Name	Quantity	Quantity Per UoP	Unit Type	Unit Cost	Markup	Discount	Item Price	Base Qty Price	Tax Rate	Status
	Select type...													

Sub Total	0.00
VAT	0.00
Grand Total	0.00

FINANCIAL HEADER

- **Currency:** The currency will default to the currency set up for the customer. Click on the **drop-down arrow** to select an alternative currency from the currency menu.
- **Tax Rate:** The tax rate will default to the tax rate set up for the customer and cannot be changed from this screen. (Note that the field has been **greyed out**.)
- **Exchange Rate:** The exchange rate will populate based on the exchange rate that was set up in the system. Type in or use the directional **arrows** if an alternative exchange rate is required.

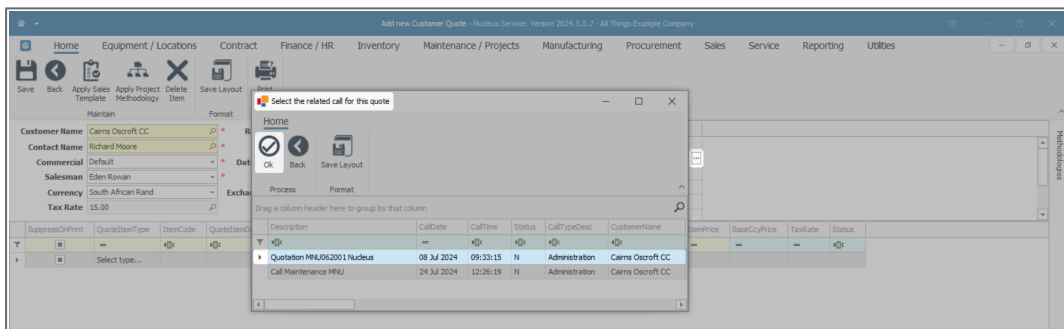


CROSS REFERENCE

- From the cross reference frame you can link reference types to the quote you are creating.
- Reference types that have references linked, will have the reference numbers populated on the screen. For example, if a quote is being raised for a particular **call** or **contract** then the call or project reference number will be listed.

Link a Reference

- To link the order to a **Reference Type** click in the Reference No text box to display the ellipsis button.
- Click on the **ellipsis** button to display the **Select the related [] for the quote** screen.
 - The message screen will display related information to the Reference information you are searching for.
 - The example has Call Reference selected and therefore the **Select the related call for this order** screen is displayed
- Click on the **row** of the **Call Reference** you wish to link to the quote.
- Click on **OK**.



Apply Sales Template

- Quote items that frequently appear on a Customer Quote, can be set up as a Sales Template.
- When you click on the [Quotes - Apply Sales Template](#) button, the quote will auto populate with the Items specified on the template you choose.

- You can add to, or remove items, as required, after which you can then adjust the quantities and selling price(s).
- You may choose to apply more than one Quote template to the Quote you are creating.

Apply Project Methodology

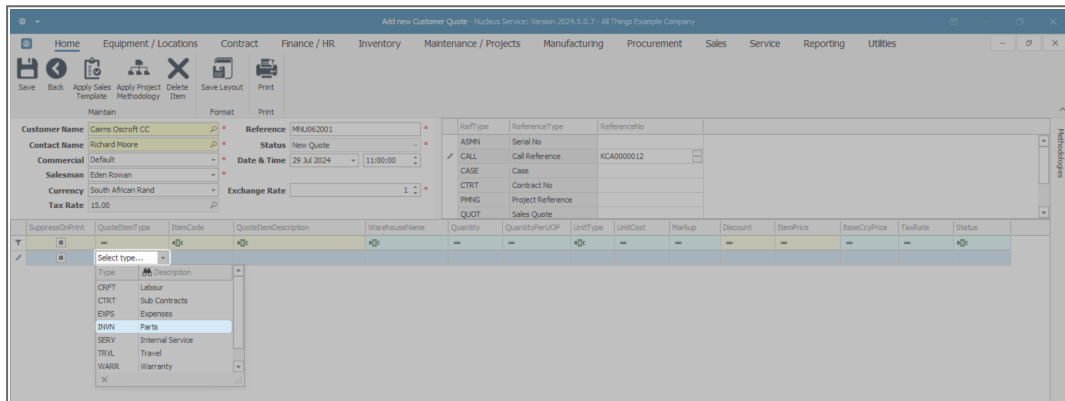
- When you click on the [Quotes - Apply Project Methodology](#) button, the Project Methodology is applied to the quote. The system will generate sub projects and work orders as set up in the methodology layers, once the quote has been converted into a New Deal Project.
- If there are resource requirements specified, then these resources will be requested.
- One, or multiple methodologies can be applied to a quote.
- A Project Methodology and Sales Templates can both be applied to the same sales quote.

ADD QUOTE ITEM

On the **Quote Items** data grid:

- Click in the **Quote Item Type** text box to display the **Item Type** menu.
- From the menu list, you can select:
 - **CRFT** (Labour craft, i.e. Technician)
 - **CTRT** (Third Party Labour/Service)
 - **EXPS** (Expenses)
 - **INVN** (Part)
 - **SERV** (Internal Labour/Service)

- **TRVL** (Travel)
- **WARR** (Warranty sale)
- **OTHR** (Type in any additional items to quote) **Note:** This will **not** be pulled through when the quote is converted to a sales order. When the quote is confirmed, this item can be set up as a part or a service, which can then be linked to the quote, in its place).

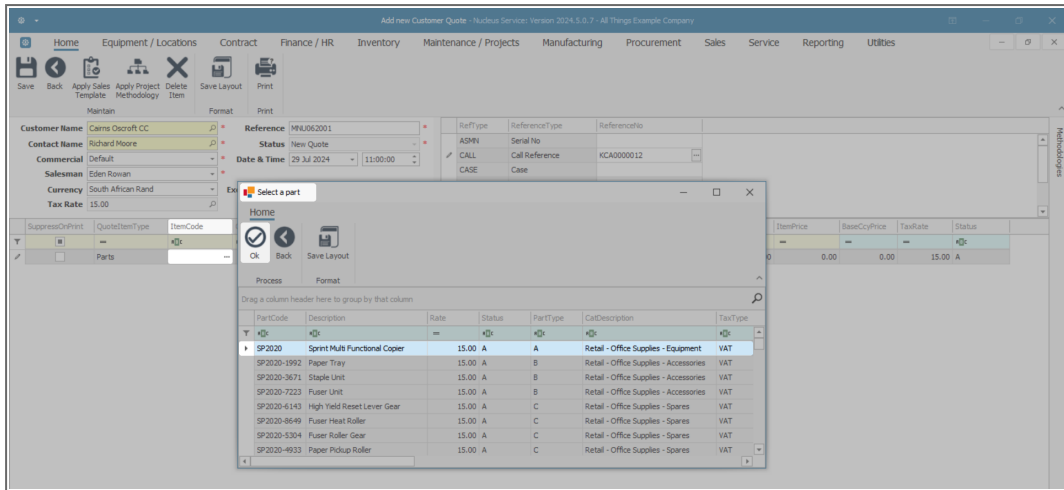


- Click on the **Item Code** text box to display the **ellipsis** button.
- Click on the **ellipsis** button to display the **Select a []** screen.



Note that the **Select a []** screen that is displayed, will be according to the **Quote Item Type** you have selected i.e. if Labour had been selected, then the **Select a craft** screen would display.

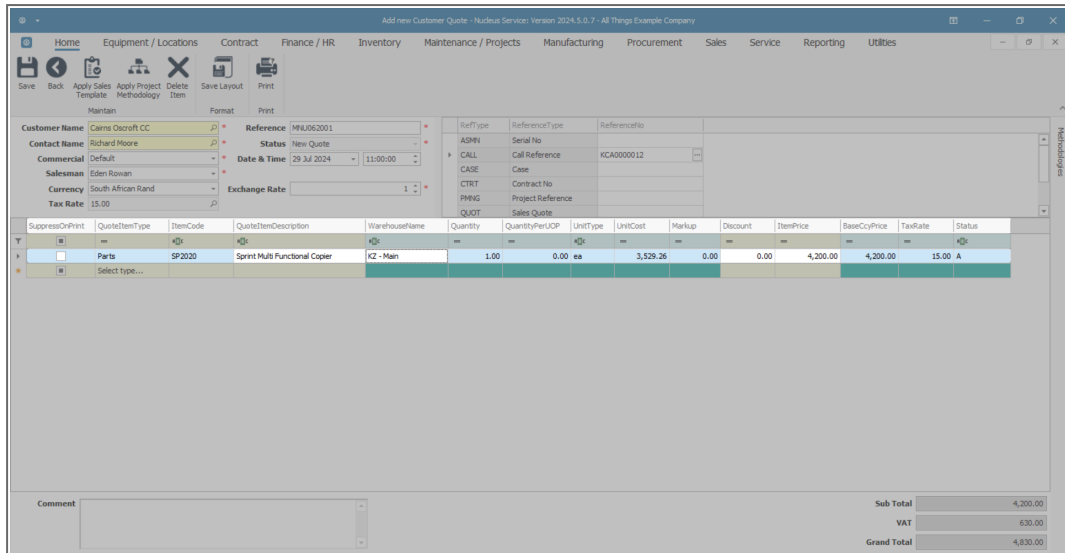
- The example has **Parts** selected as the **Quote Item Type** and therefore the **Select a part** screen is displayed.
- Click on the **row** of the **item** you wish to add.
- Click on **OK**.




- The **Quote Item Description** and **Warehouse Name** fields will auto populate once the **Item Code** has been selected.
- Make the necessary changes to the **Quantity**, **Discount** and **Unit Selling Price** by clicking in the text box and **type** or use the **directional arrows** to enter the correct amounts.

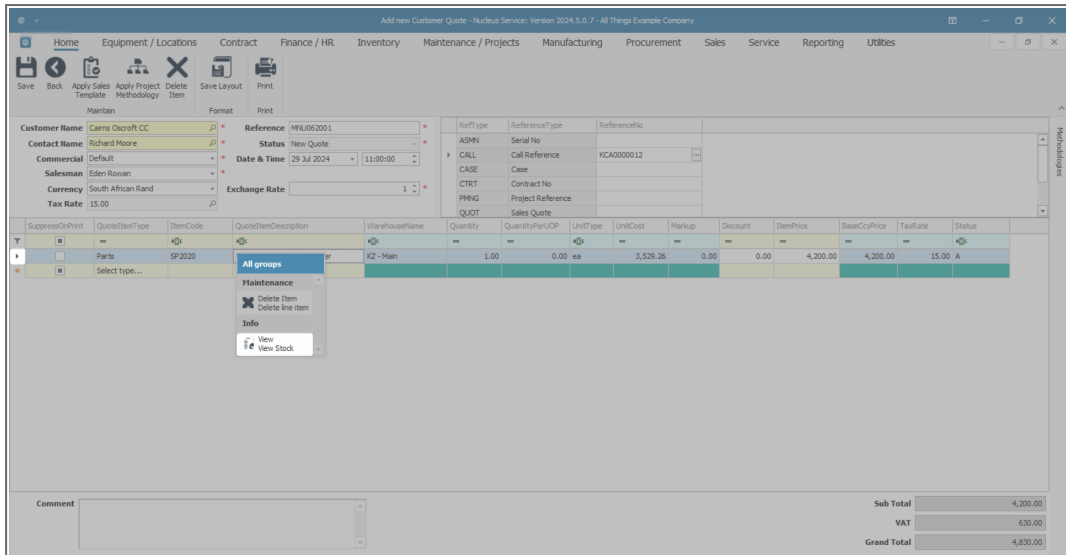
NEXT QUOTE ITEM ROW

- To **add** a new line, click in the blank area below the Quote Items data grid or press **Tab** at the end of the last item line to open a new item row.

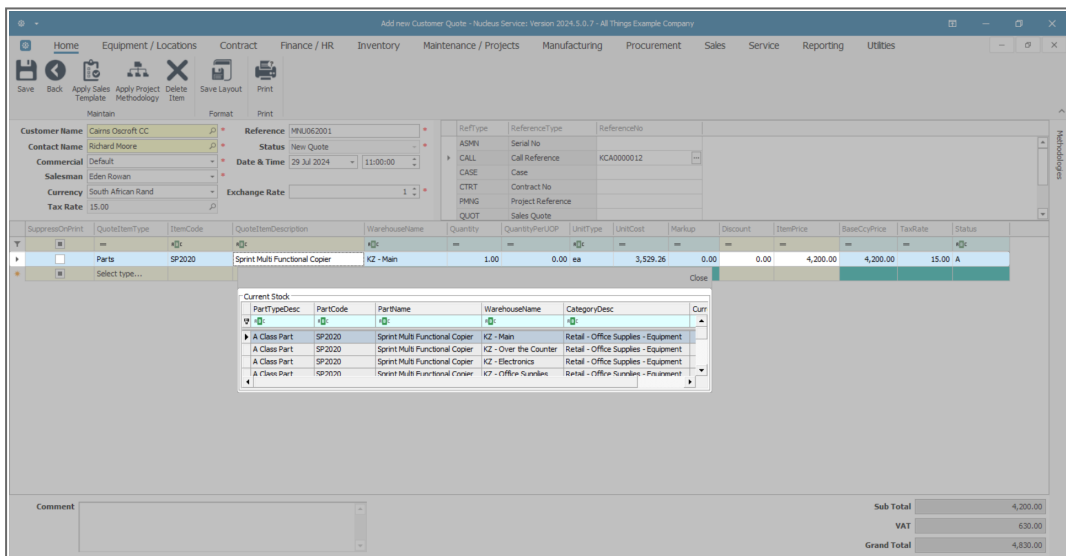


VIEW STOCK

- A View Stock functionality has been added to the Sales Quotes and Sales Orders screens (available in later versions of Nucleus Service).
- When creating a quote, the sales representative can check the stock quantities of items to be added. If a particular item is not in stock, the customer can be informed about potential delivery delays or offered an alternative substitute item. This allows the customer to choose the substitute if they prefer timely delivery, enabling the sales representative to manage the customer's expectations effectively.
-  Right click in the row of the item that you wish to view the stock quantity of.
- An **All groups** menu screen will display.
- Select **View - View Stock**.

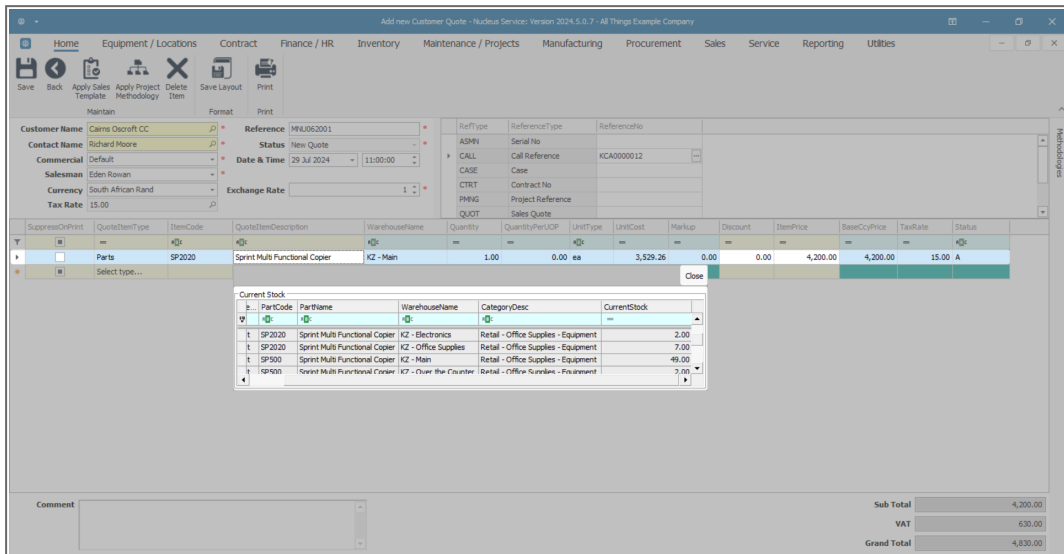


- The **Current Stock** screen will display.
- Each row represents a **warehouse** that contains stock of the item.
- Using the scroll bar at the bottom of the screen, scroll right until you can view the stock **quantities** in each warehouse.



- You will now be able to view **how much** stock is in each Warehouse.

- This list now also returns alternate parts in stock : Version Compatibility¹
- Click **Close** on the Current Stock data grid when you are done.



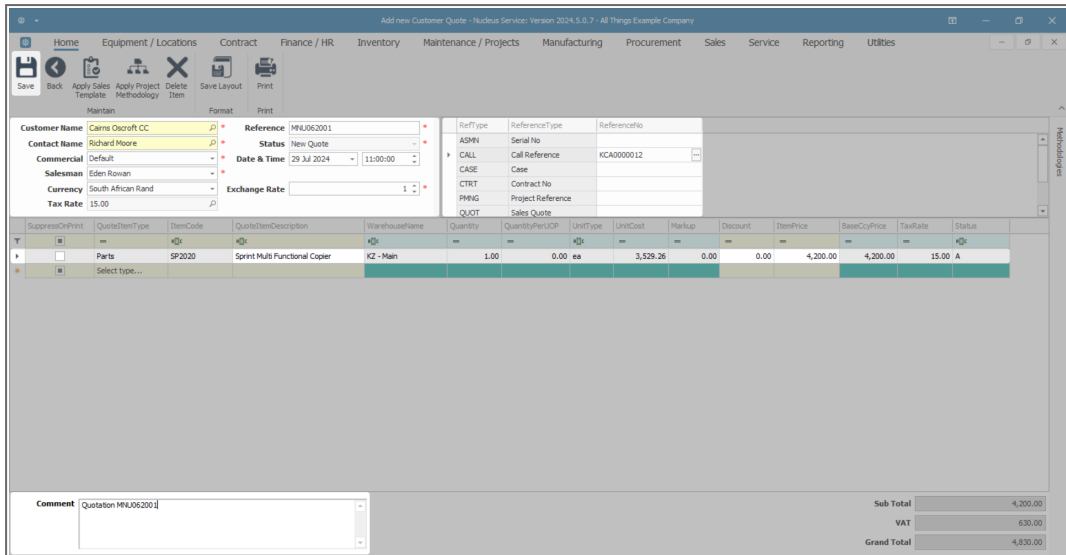
COMMENTS

- Click in the Comments text box to type a **comment** for this quote. The comment will display on the **quote document**.

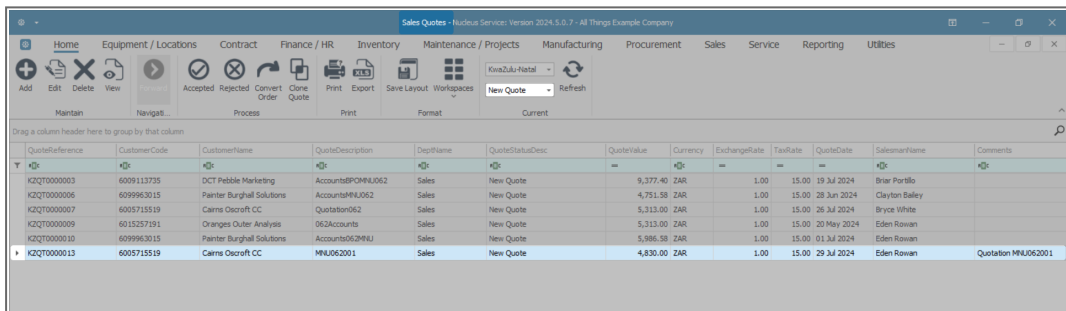
SAVE QUOTE

- When you have finished adding all the required items, click on **Save**.

¹ BPO2 v2.4.0.11 or higher



- The new quote can now be viewed in the **Sales Quotes** listing screen where the status is set to **New quote**.



VIEW QUOTE IN CRM

The new quote will pull through to **CRM** where it can be viewed.

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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