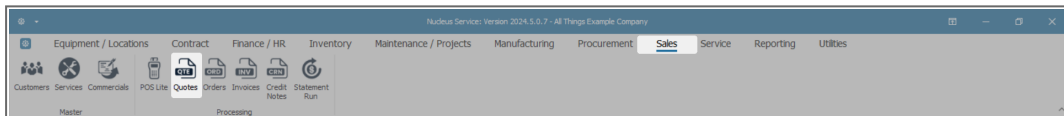


SALES

QUOTES - CLONE A QUOTE

From the Sales Quotes listing screen you have access to the **Clone Quote** feature, which enables you to make a copy of a selected quote. The quote header details and the line items that have been cloned from the original quote can be edited or removed and new items can be added, as required and therefore saves the user valuable time.

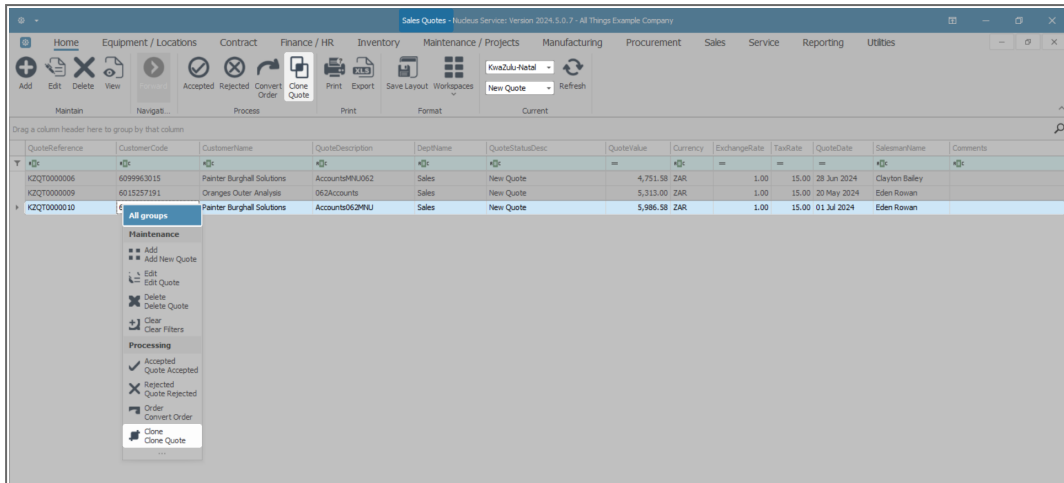
Ribbon Select **Sales > Quotes**



- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** that contains the quote to be copied.
 - The example has **KwaZulu-Natal** selected.
- Select the **Status** that contains the quote to be copied (a quote can be cloned in any status):
 - The example has **New Quote** selected.
- Select the **row** of the quote you wish to clone.
- Click **Clone Quote**.



Short cut key: **Right click** on the selected **row** in the data grid to display the **All Groups** menu list. Click on **Clone Quote**.



The nature of cloning a quote is to **save time** when creating new quotes for customers. On this basis, most of the details of the quote would remain the same, bar the Reference. However, you may wish to edit some of the details, for example, the **customer information**, the **discount amount** or add items, such as a warranty, to the quote.

EDIT QUOTE

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

CREATE REFERENCE

- Ensure that a new **Reference** is typed for this quote. This is for internal use and is very important as it is used to find and identify the quote once it has been processed.

CUSTOMER AND FINANCIAL HEADER INFORMATION

- Change the Customer Heading or the Financial Heading information as required. If you need more information on how to edit the Quote Heading Information click on the link to be redirected to [Quotes Edit Sales Quote](#).

LINK A CROSS REFERENCE

- Follow the process to [link Cross Reference](#) details for the quote.



Note that the cross reference information of the original quote will not clone.

ADD / EDIT / DELETE LINE ITEMS

- Individual Item Lines can be [added](#), [edited or deleted](#) from the Items data grid as required.

APPLY PROJECT METHODOLOGY

- You can apply a Sales Template which will be appended to the existing quote items, and / or [Quotes - Apply Project Methodology](#) to the cloned quote, if required.

ADD / EDIT A COMMENT

- Add or make changes to the **Comment** for the new quote, if required. The comments field will pull through to the Sales Quote document when it is printed.

SuppressOrPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUoP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCcyPrice	TaxRate	Status
<input type="checkbox"/>	Parts	SP2020	Sprint Multi Functional Copier	KZ - Main	1.00	0.00	ea	3,529.26	5.00	0.00	3,705.72	3,705.72	15.00	A
<input type="checkbox"/>	Sub Contracts	INST	Installation Fee		1.00	0.00		0.00	20.00	0.00	1,500.00	1,500.00	15.00	A

SAVE QUOTE

- When you have finished editing the Customer Quote, click on **Save**.

- The **Sales Quotes** listing screen will be updated with the New Quote.

VIEW QUOTE IN CRM

The new cloned quote will pull through to **CRM** where you can [Quotes - View Quote in CRM](#).

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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