

# **SALES**

## **QUOTES - EDIT SALES QUOTE**

Ribbon Select Sales > Quotes

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- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** where the quote can be located.
  - The example has **KwaZulu-Natal** selected.
- The **Sales Quotes** listing screen opens in the **N New Quote** Status by default. This **Status** must remain selected.
- Select the **row** of the quote you wish to **Edit**.
- Click on Edit.

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

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• The Edit Customer Quote - KZQT [] screen will display.

## **QUOTE HEADER**

#### **Customer Heading**

- **Customer:** Click on the **search button** to select an alternative Customer from the **Select a customer for this quote** list.
- **Contact Name:** Click on the **search button** to select an alternative contact for the quote.
- **Commercial:** To change the **commercial**<sup>1</sup> for the quote, click on the **drop-down arrow** to select the required commercial from the list.
  - The <u>commercial linked to the selected customer</u> would have auto populated to the commercial field.
- Salesman: To change the sales representative responsible for the quote, click on the drop-down arrow to select the sales representative from the list.

This is an important record for commission purposes.

• **Reference:** Add or make the necessary change to the reference for the quote.

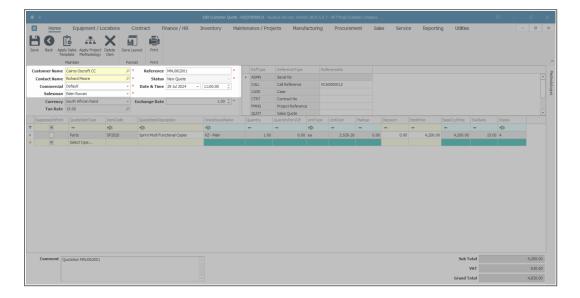
The reference is <u>very important</u> for internal use as it is used to find and identify the quote once it has been processed.

• Status: This field will default to 'New Quote' and cannot be changed.

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



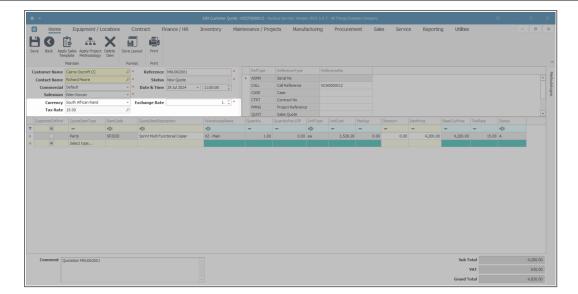
- Date & Time: Date and time will display the date and time the quote was created.
  - To change the Date, **type** in or click on the down **arrow** to select the date using the calendar function.
  - To change the Time, **type** in or use the directional **arrows** to select the time.



#### **FINANCIAL HEADING**

- **Currency:** The currency would have defaulted to the currency used by the customer when the quote was created. To change the currency, click on the **drop-down arrow** to choose a different currency from the list.
- **Tax Rate:** The tax rate would have defaulted to the tax rate set up for the customer when the quote was created. This field cannot be edited.
- Exchange Rate: The exchange rate will display the exchange rate that was set up in the system for the customer when the quote was created. Type in or use the directional **arrows** to modify the exchange rate for the quote.





#### **CROSS REFERENCE INFORMATION**

- From the cross reference grid you can link Reference Types to the quote.
- The Reference Number column will display any Reference Types that have already been linked.

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#### Change or Link a Reference

- Click in the **Reference Number** field of the reference you wish to add or change, to display the **ellipsis** button.
- Click on the ellipsis button to display the Select the related [] for the quote screen.
- Click on the **row** of the reference you wish to link to the quote.
- Click on OK.

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## QUOTE ITEM DATA GRID

### **Apply Sales Template**

- When you click on Quotes Apply Sales Template, the quote will populate with the **Items** specified on the template you select.
- The template items will be appended to Quote Items that have already been added to the quote.
- You can add to, or remove items, as required, after which you can then adjust the quantities and selling price(s).



## **Apply Project Methodology**

- When you Quotes Apply Project Methodology, Project Methodology is applied to a 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.
- You can apply a Project Methodology and a Sales Template to the same sales quote.

#### **DELETE QUOTE ITEM**

- Select the **row** of the quote item you wish to delete.
- Click Delete Item.

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

- When you receive the Confirm delete line message to confirm -
  - Are you sure you want to remove this line from the quote?
- Click on Yes.



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#### ADD AND EDIT QUOTE ITEMS

- To add a new line, click in the blank area <u>below</u> the Quote Items data grid or press Tab at the end of the last item line to open a new item row.
- Follow the process to "Add Quote Item" on page 6(s) to the Quote.
- 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.

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#### **EDIT COMMENTS**

• Click in the Comments text box to add a comment or to make changes to an existing comment. The comment will display on the **quote document**.

### **SAVE QUOTE**

• When you have finished making the required changes, click **Save**.

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• You will return to the Sales Quotes listing screen.

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## **VIEW QUOTE IN CRM**

The updated 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
- <u>Apply Project Methodology</u>
- 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
- <u>CRM Basics Quotes</u>
- View Quote in CRM
- Add new Quote in Sales Studio

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