

SALES

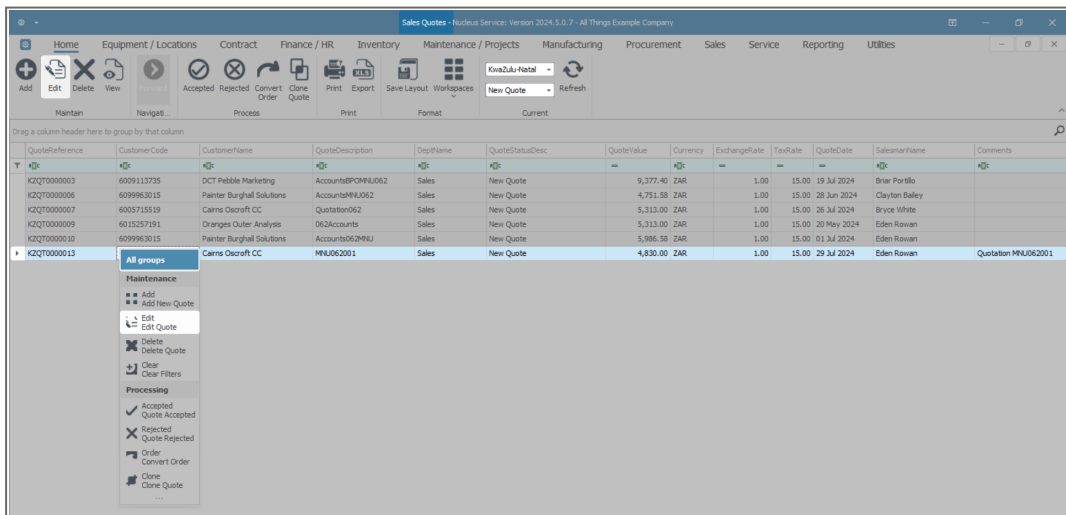
QUOTES - EDIT SALES QUOTE

Ribbon Select Sales > Quotes



- 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**.



- 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**¹ for the quote, click on the **drop-down arrow** to select the required commercial from the list.
 - The commercial linked to the selected customer 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.

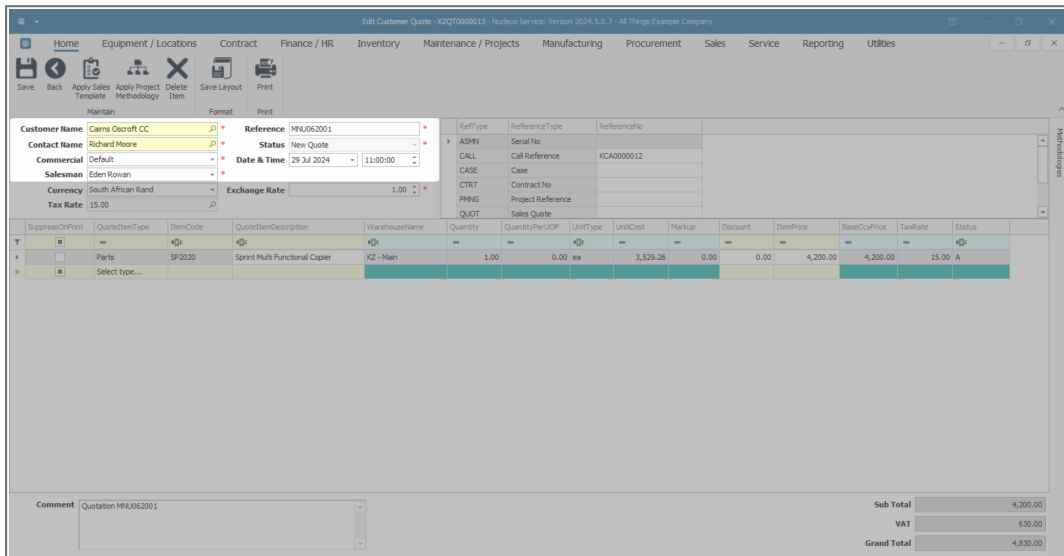


The reference is very important for internal use as it is used to find and identify the quote once it has been processed.

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

¹Commercial 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.

Customer Information:
 Customer Name: Cairns Osofcof CC
 Contact Name: Richard Moore
 Commercial: Default
 Salesman: Eden Rowan
 Reference: MNJ062001
 Status: New Quote
 Date & Time: 29 Jul 2024 11:00:00
 Currency: South African Rand
 Exchange Rate: 1.00

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	
CALL	Call Reference	KCA0000012
CASE	Case	
CTRT	Contract No	
PMNG	Project Reference	
QUOT	Sales Quote	

SuppressOrPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUoP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCpyPrice	TaxRate	Status
	Parts	SP2020	Sprint Multi Functional Copier	K2 - Main	1.00	0.00	ea	3,529.26	0.00	0.00	4,200.00	4,200.00	15.00	A
		Select type...												

Summary:
 Sub Total: 4,200.00
 VAT: 630.00
 Grand Total: 4,830.00

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.

Customer Information:
 Customer Name: Cairns Osofcof CC
 Contact Name: Richard Moore
 Commercial: Default
 Salesman: Eden Rowan
 Reference: MNJ062001
 Status: New Quote
 Date & Time: 29 Jul 2024 11:00:00
 Currency: South African Rand
 Exchange Rate: 1.00

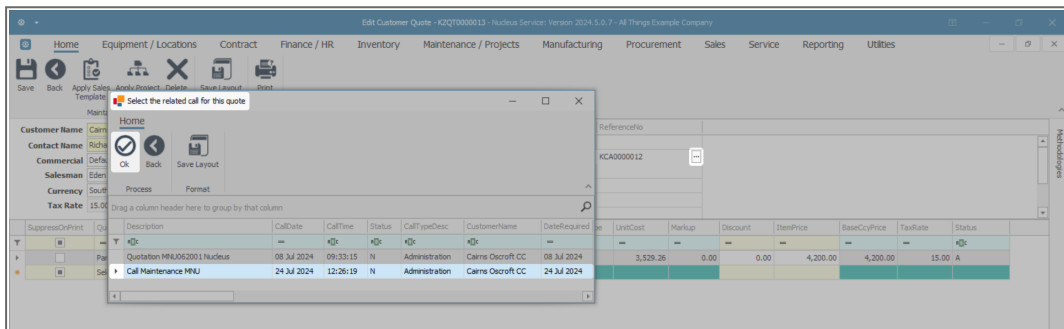
RefType	ReferenceType	ReferenceNo
ASMN	Serial No	
CALL	Call Reference	KCA0000012
CASE	Case	
CTRT	Contract No	
PMNG	Project Reference	
QUOT	Sales Quote	

SuppressOrPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUoP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCpyPrice	TaxRate	Status
	Parts	SP2020	Sprint Multi Functional Copier	K2 - Main	1.00	0.00	ea	3,529.26	0.00	0.00	4,200.00	4,200.00	15.00	A
		Select type...												

Summary:
 Sub Total: 4,200.00
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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**.



QUOTE ITEM DATA GRID


Apply Sales Template

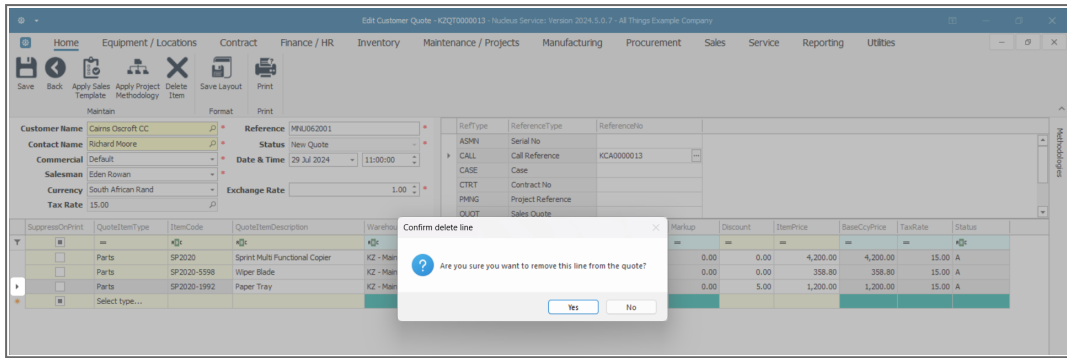
- When you click on [Quotes - Apply Sales Template](#), the quote will populate with the Items specified on the template you select.
- The template items will be appended to Quote Items that have already been added to the quote.
- You can add to, or remove items, as required, after which you can then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

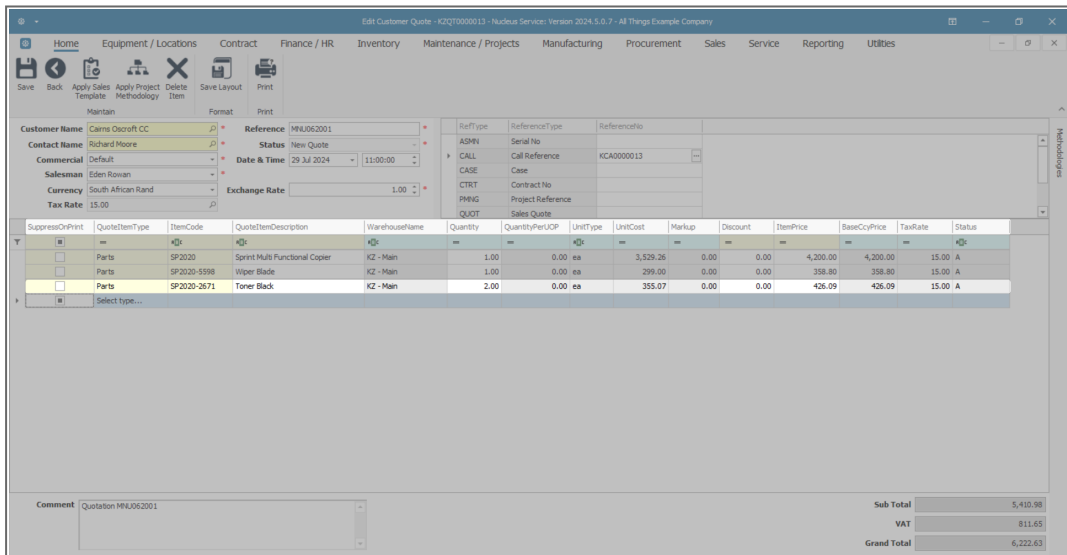
DELETE QUOTE ITEM

- 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**.



ADD AND EDIT QUOTE ITEMS

- 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.
- 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.

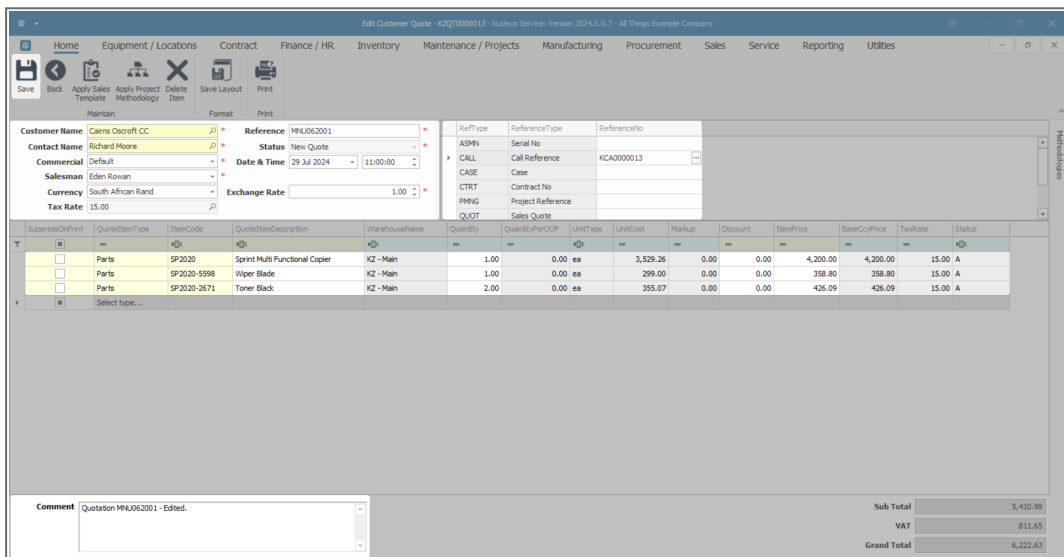


EDIT COMMENTS

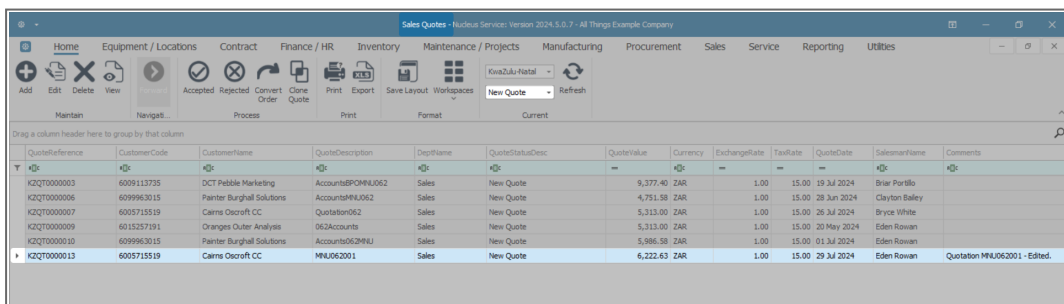
- Click in the Comments text box to add a comment or to make changes to an existing comment. The comment will display on the quote document.

SAVE QUOTE

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



- You will return to the **Sales Quotes** listing screen.



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](#)
- [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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