

## SALES

### QUOTES – APPLY PROJECT METHODOLOGY

When a 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.

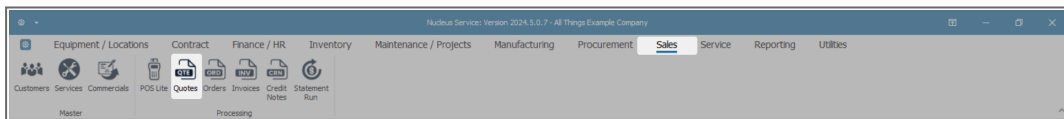
If **resource requirements** were specified, then these will be requested.

A single- or multiple methodologies can be applied to a quote.

Both Methodologies and Sales Templates can be applied to the same sales quote.

View [Applied Project Methodology](#) for detailed information on this topic.

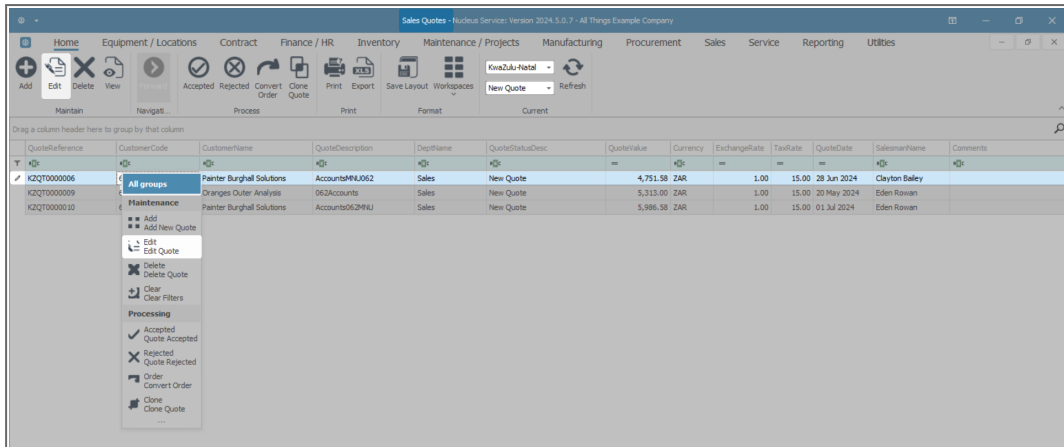
#### Ribbon Select Sales > Quotes



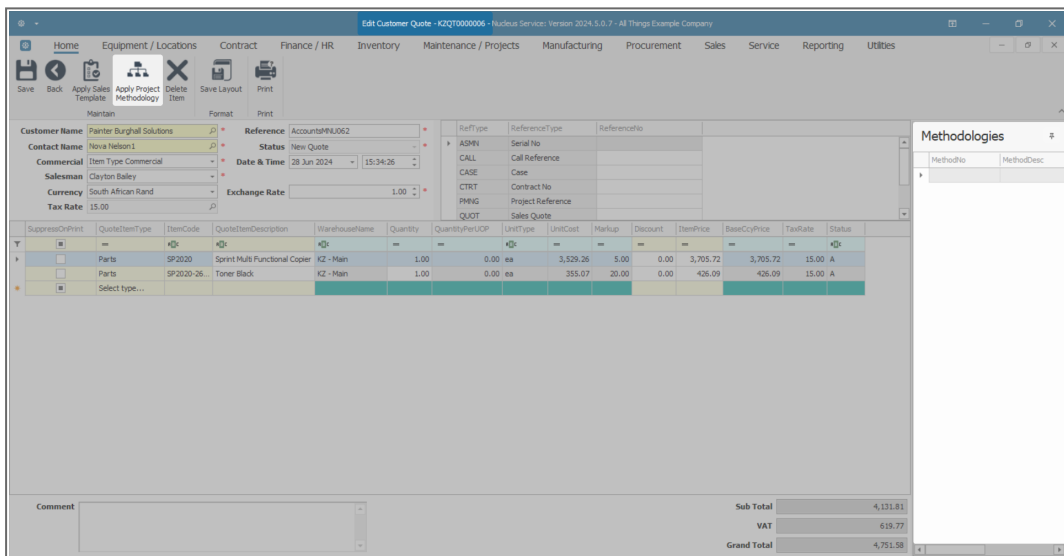
- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** where the quote can be located.
  - The example has **KwaZulu-Natal** selected.
- Ensure that the **Status** has been set to **New Quote**.
- Select the **row** of the quote you wish to apply a Methodology to.
- Click on **Edit**.



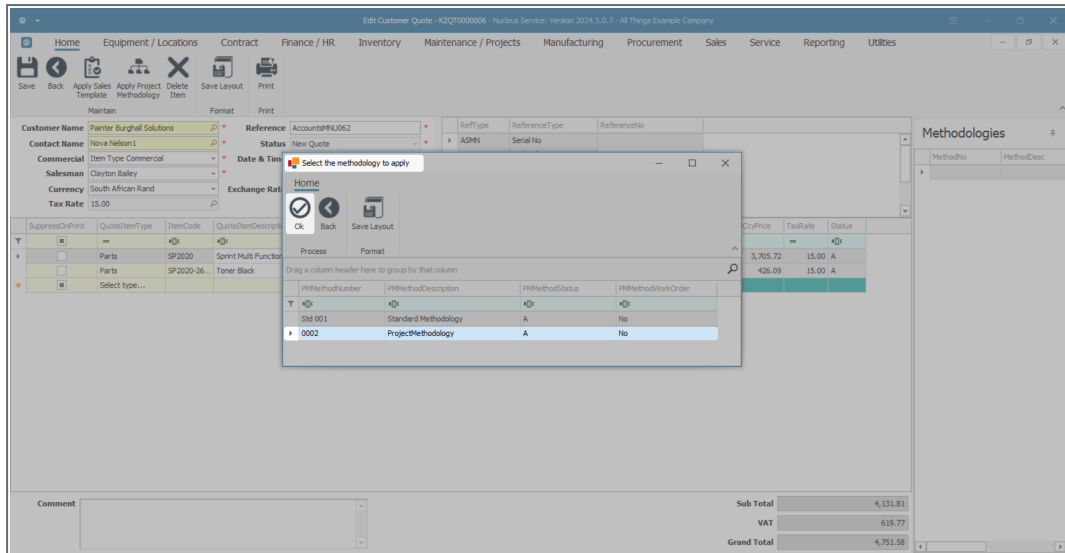
**Short cut key: Right click** on the selected **row** in the data grid to display the **All Groups** menu list. Click on **Edit**.



- The **Edit Customer Quote - KZQT [ ]** will be displayed.
- Click on the **Methodologies** tab to view any project methodologies that have already been linked.
- Click on **Apply Project Methodology**.



- The **Select the methodology to apply** screen will display.
- Click on the **row** of the Project Methodology you wish to apply to the quote.
- Click on **OK**.



- The Quote will be updated and the tasks defined by the methodology will be appended to any existing quote items that have already been created.
- The **Methodologies frame** has also been updated with the Methodology information selected.
- You may now proceed to edit Quote Item(s) or "**Delete Quote Item**" on page 6(s) as required.
- When have finished editing the Quote, click **Save** to return to the Sales Quotes listing screen.



# Quotes - Apply Project Methodology

The screenshot displays the 'Edit Customer Quote' window in CO3 software. The interface includes a top navigation bar with tabs like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Save, Back, Apply Sales Template, Apply Project Methodology, Delete Item, Save Layout, and Print. The main area is divided into several sections:

- Customer Information:** Customer Name (Painter Burghall Solutions), Reference (AccountsMNU062), Status (New Quote), Date & Time (28 Jun 2024 15:34:26), Commercial (Nova Nelson1), Salesman (Clayton Bailey), Currency (South African Rand), Exchange Rate (1.00), and Tax Rate (15.00).
- Reference Table:** A table with columns RefType, ReferenceType, and ReferenceNo. It lists various reference types like ASMN, Serial No, CALL, Call Reference, CASE, Case, CTRT, Contract No, PMNG, Project Reference, and QUOT, Sales Quote.
- Methodologies:** A table with columns MethodNo and MethodDesc. It shows MethodNo 0002 and MethodDesc ProjectMethodology.
- Item Table:** A table with columns SuppressOrPrint, QuoteItem Type, ItemCode, QuoteItemDescription, WarehouseName, Quantity, QuantityPerUoP, UnitType, UnitCost, Markup, Discount, ItemPrice, BaseCoPrice, TaxRate, and Status. It lists two items: 'Parts SP2020 Sprint Multi Functional Copier KZ - Main' and 'Parts SP2020-2671 Toner Black KZ - Main'.
- Summary:** Sub Total (4,131.81), VAT (619.77), and Grand Total (4,751.58).

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