

SALES

QUOTES - VIEW SALES QUOTE

Ribbon Select **Sales > Quotes**



- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** the quote was created for.
 - The example has **KwaZulu-Natal** selected.
- Select the **Status** for the Sales Quote you wish to view.



Note that a Sales Quote can be viewed in any Status.

- The example has **New Quote** selected.
- Select the **row** of the quote you wish to view.
- Click on **View**.

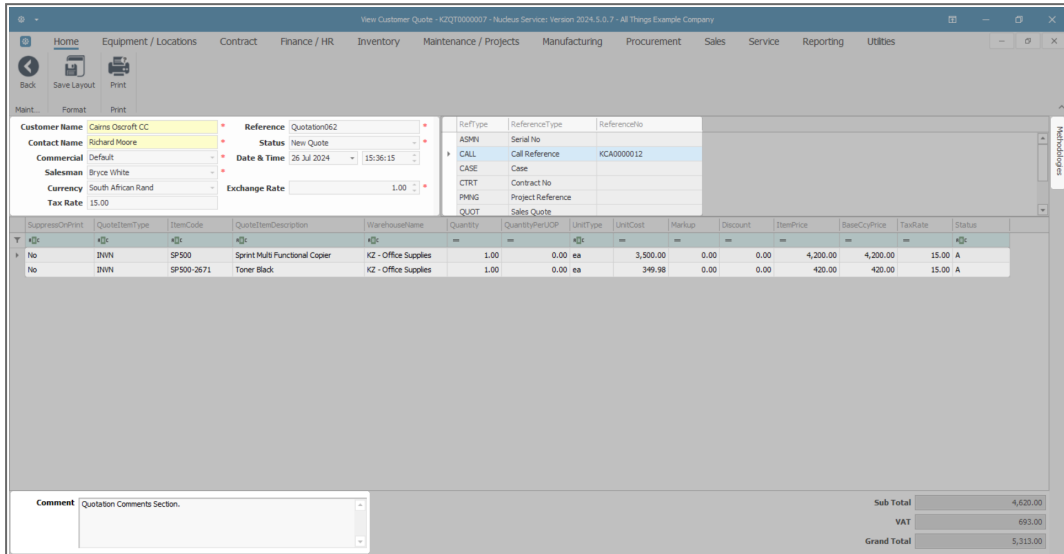
QuoteReference	CustomerCode	CustomerName	QuoteDescription	DeptName	QuoteStatusDesc	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments
KZQT0000003	6099113735	DCT Pebble Marketing	AccountSPOM&J062	Sales	New Quote	9,377.40	ZAR	1.00	15.00	19 Jul 2024	Brian Portillo	
KZQT0000006	6099963015	Painter Burghall Solutions	AccountMNU062	Sales	New Quote	4,751.58	ZAR	1.00	15.00	28 Jun 2024	Clayton Bailey	
KZQT0000007	6005715519	Cairns Oscoft CC	Quotation062	Sales	New Quote	5,313.00	ZAR	1.00	15.00	26 Jul 2024	Bryce White	
KZQT0000009	6015257191	Oranges Outer Analysis	062Accounts	Sales	New Quote	5,313.00	ZAR	1.00	15.00	20 May 2024	Eden Rowan	
KZQT0000010	6099963015	Painter Burghall Solutions	Account062MNU	Sales	New Quote	5,986.58	ZAR	1.00	15.00	01 Jul 2024	Eden Rowan	
KZQT0000013	6005715519	Cairns Oscoft CC	MNU062001	Sales	New Quote	6,222.63	ZAR	1.00	15.00	29 Jul 2024	Eden Rowan	Quotation MNU062001 - Ed

- The **View Customer Quote - KZQT []** screen will display.

The Customer Quote contains:

- The Customer Details frame.
- The Related References frame.

- The Quote Items frame.
- The Methodologies tab.
- The Comments field.



VIEW METHODOLOGIES

- Click on the **Methodologies** tab, to expand the frame.
- Any [methodologies](#) linked to the quote will be listed.
- Clicking anywhere outside the Methodologies frame will **hide the frame**.
- To keep the frame from closing, **pin the frame** to the screen by clicking on the pin button. Clicking on the pin again, will allow you to close the frame once again. (Refer to [Docking Panels](#) for detailed handling on this topic.)
- **Close** the screen when you are done.

The screenshot displays the 'View Sales Quote' interface in the CO3 software. The main window title is 'New Customer Quote - KZQT0000007 - Nucleus Service: Version 2024.5.0.7 - All Things Example Company'. The interface includes a navigation menu at the top with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The main content area is divided into several sections:

- Customer Information:** Customer Name (Carns Ozsoft CC), Contact Name (Richard Moore), Commercial (Default), Salesman (Bryce White), Currency (South African Rand), and Tax Rate (15.00).
- Quote Details:** Reference (Quotation062), Status (New Quote), Date & Time (26 Jul 2024 15:36:15), and Exchange Rate (1.00).
- Reference Table:** A table with columns for RefType, ReferenceType, and ReferenceNo. It lists various reference types like ASMN, Serial No, CALL, Call Reference, CASE, Case, CTRT, Contract No, PHNG, Project Reference, and QUOT, Sales Quote.
- Item Table:** A table with columns for SuppressOrPrint, QuoteItemType, ItemCode, QuoteItemDescription, WarehouseName, Quantity, QuantityPerUoP, UnitType, UnitCost, Markup, Discount, ItemPrice, BaseCcyPrice, TaxRate, and Status. It lists two items: 'Sprint Multi Functional Copier' and 'Toner Black'.
- Methodologies Panel:** A panel on the right side showing a table with columns for MethodNo and MethodDesc. It lists 'Std 001' and 'Standard Methodology'.
- Summary:** A section at the bottom right showing Sub Total (4,020.00), VAT (693.00), and Grand Total (5,313.00).

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](#)

MNU.062.011

