

We are currently updating our site; thank you for your patience.

# SERVICE

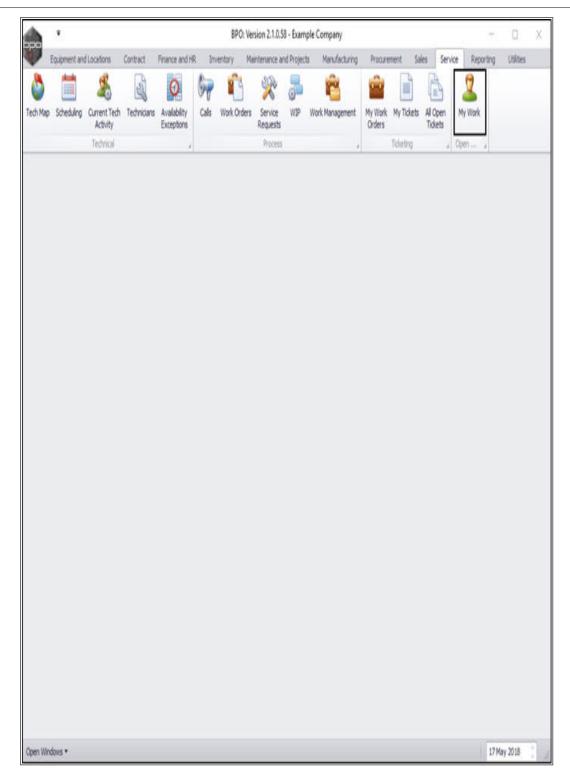
# **MY WORK - ADD A QUOTE**

You may need to raise a quote for additional work that must be done, but needs approval from the client, as it will be billed.

When using the **Email** option to send a Sales Quote, please note that it will be mailed via the **BPO Email Service** on the server (<u>not</u> from your own MS Outlook).

Ribbon Access: Service > My Work





The My Work listing screen will be displayed.

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#### **ADD A QUOTE**

- Click on the **row selector** in front of the **work order** where you wish to **raise a quote**.
- Click on **Edit**.

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|        | ٠          |                 |              |                   |            | ٨                    | ly Work - I | 8PO: Version 2.1.0.5                | 8 - Example ( | Comp  | any         |            |              | 57               |           | Х   |
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The Maintain WO - Ref [] screen will be displayed.

• Click on the **Quotes** tile.



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| ocessing         |            | Work Order | r Item - |                             |        |       |          |       | 1              | A       | ctual End            | 17 Jun 2018  | •       | 00:00:00               | ;  |   |           |        |   |   |
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| Unit?            | -          |            | nem      | 2020-103053                 | 11     |       |          | P • 1 |                |         |                      |              |         |                        |    |   |           |        |   |   |
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| nvokes           |            |            |          |                             |        |       |          |       |                |         |                      |              |         |                        | 1  |   |           |        |   |   |
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| Credit Notes     |            |            |          |                             |        |       |          |       |                |         |                      |              |         |                        |    |   |           |        |   |   |
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|                  |            |            |          |                             |        |       |          |       |                |         |                      |              |         |                        |    |   |           |        |   |   |

The Sales Quotes for Work Order [] listing screen will be displayed.



If there were <u>already</u> sales quotes linked to this work order, they would be listed here.

• Click on Add.

|            |          |          |           |             |          | Sales Qu       | otes for W       | ork Orde | r W000 | 01664 - BP | 0: Version | 2.1.0.58 -     | Examp | ile Compi  | any   |         |            |      | - 3      | 0          | Х        |
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| + ===      |          |          |           |             |          |                | _                |          | _      |            |            |                |       |            | _     | _       |            | _    |          | 7 May 2018 |          |



The Add new Customer Quote screen will be displayed.

# **QUOTE HEADER DETAILS**

- **Customer Name:** This will auto populate with the name of the customer linked to this work order.
- **Contact Name:** Click on the search button and select a contact from the **Select a contact for this quote** pop up screen.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required.
- Salesman: This will auto populate with the person currently logged on to the system but you can click on the search button and select an alternative salesman if required.
- **Reference:** Type in a reference for the quote.
- Status: This will auto populate as New quote.
- **Date and Time:** These will auto populate with the current date and time.
  - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
  - **Time:** You can either type in or use the arrow indicators to select an alternative time if required.



|                 |              |                      |                     | Ad              | id new Customer | Quote - Bi | PO: Version 2.1.0. | 58 - Examp | ile Compa | ny .                    |          |                               |              | 1         | ۵      | 3   |
|-----------------|--------------|----------------------|---------------------|-----------------|-----------------|------------|--------------------|------------|-----------|-------------------------|----------|-------------------------------|--------------|-----------|--------|-----|
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|                 | ply Sales Ag | ply Project (        | X<br>Xelete<br>Item | Save Layout     | Print .         |            |                    |            |           |                         |          |                               |              |           |        |     |
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| Customer Name   | Hope Works   |                      |                     | - 10 Million    | rence           |            |                    | 1000       |           | Reference               | eType    |                               | renceNo      |           |        |     |
| Contact Name    |              |                      |                     |                 | tatus New quote |            |                    | I ASH      |           | Serial No<br>Call Refer |          | 2120                          | -103053      |           |        | i   |
| Commercial      |              |                      |                     | • • Date &      | Time 21 May 20  | 18 •       | 13:21:14           | CAS        |           | Case                    | ore      |                               |              |           |        |     |
| Salesman        | Abigal Mine  |                      |                     | • •             |                 |            |                    | (10        |           | Contract                | No       | 000                           | 000043       |           |        | Į   |
|                 | South Africa | n Rand               |                     | Exchange        | Rate            |            | 1:                 | FNL        |           | Location                |          | 6.600                         | *****        |           |        |     |
| Tax Rate        | 15.00        |                      |                     | P               |                 |            |                    | PM         |           | Project R               | eference |                               |              |           |        | ,   |
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#### **QUOTE FINANCIAL DETAILS**

- **Currency:** This will populate with the currency set up on the customer. Use the drop-down arrow to display the currency menu and select an alternative currency if required.
- **Tax Rate:** This will populate with the tax rate set up on the customer. Click on the search button and select a new rate if required.
- Exchange Rate: This will populate based on the currency set up in the system. Type in or use the directional arrows to select a new exchange rate if required.



| Home Eo                          | upment and Locatio               | ns Contrac   | f i Fin |              |        |                     |               | Version 2.1.0.58<br>nd Projects 1 |                    |             | rement .                    | Sales    | Service            | Reporting 1  |         | 0<br>+ ( | )<br>9. |
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| ustomer Name                     | Montain<br>Hope Works            |              | p •     | Refere       | 1      | V Q-0123            |               | •                                 | RefTyp             | e Rel       | ferenceTyp                  | pe .     | Referen            | ceNo         |         |          |         |
| Contact Name<br>Commercial       | Default                          |              | P .     |              |        | w quote<br>May 2018 | • 13:2        | 1:14 <b>;</b>                     | ASMN CALL          |             | ial No<br>I Referenci<br>se | e        | 2020-10            | 3053         |         |          | 1       |
| Salesman<br>Currency<br>Tax Rate | South African Rano               | ł            | • •     | Exchange R   | ate    |                     |               | 1:                                | CTRT<br>PNLC       | Cor         | ntract No<br>aton           |          | C00000             | 043          |         |          |         |
|                                  | 1120                             |              |         | _            | _      |                     |               |                                   |                    | Pro         | ject Refer                  | ence     |                    |              |         | _        |         |
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#### **CROSS REFERENCE INFORMATION**

- In the **References** frame you can see that this quote is linked to a **Serial Number** and a **Contract Number**.
- Scroll down in this References frame.

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| 2     | Home Ex     | quipment and Li               | ations    | Contra              | t B       | anot and HR  | 6 1   | Inventory M    | aintenance a | and Projecta M | anufacturin | о Ргоси  | rement               | Sales    | Service      | Reporting    | Utites    | - 6   | 9  |
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| ustor |             | Mantan<br>Hope Works          |           |                     | , Fo      | nat j P      |       | 4<br>HW Q-0123 |              | •              | RefTyp      |          | (erenceTy)           | pe       | Referen      |              |           | _     |    |
|       |             | Julia Ritson                  |           |                     | ρ.        |              |       | New quote      |              | ÷ •            | ASMN CALL   |          | ial No<br>I Referenc |          | 2020-10      | 3053         |           |       |    |
|       | ommercial   |                               |           |                     |           | Date & T     | ime   | 21 May 2018    | • 13:2       | 11:14 :        | CASE        | Car      |                      | 6        |              |              |           |       |    |
|       |             | Abigal Mine<br>South African  | and       |                     | 1         |              |       |                |              | 1:1            | CTRT        | _        | tract No             |          | C00000       | 043          |           |       |    |
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|       | essOnPrint  | QuoteItemTyp                  | * Iten    | Code                | Quotellie | mDescription | Wa    | rehouseName    | Quantity     | QuantityPerUOP | UnitType    | UnitCost | Maritup              | Discount | ItemPrice    | BaseCcyPrice | : TaxRate | Statu | 5. |
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• You can now view the <u>linked</u>work order number that you initially selected when you began this **'raise a quote'** process.



| Hone        | e Eq         | upment and Loca                 | itions Co                    | tract     | Ene        | nce and HR  | 1     | Inventory M | aintenance a | and Projects 1 | Anufacturin | g Procu  | enent :     | Sales :  | Service   | Reporting    | Utilities | - 1  | Ø     |
|-------------|--------------|---------------------------------|------------------------------|-----------|------------|-------------|-------|-------------|--------------|----------------|-------------|----------|-------------|----------|-----------|--------------|-----------|------|-------|
|             |              | 4                               |                              | K         | 1          |             | C     | )           |              |                |             |          |             |          |           |              |           |      |       |
|             |              |                                 | 5                            | 70 I      |            | 5.11        |       |             |              |                |             |          |             |          |           |              |           |      |       |
| sve Bad     | ok App<br>Te | ply Sales Apply<br>mplate Methy | Project De<br>Idology 1      | ete<br>en | Save       | Layout      | Print |             |              |                |             |          |             |          |           |              |           |      |       |
|             |              | Maintain                        |                              |           | Fan        | et "P       | tet.  | 4           |              |                |             |          |             |          |           |              |           |      |       |
| ustomer I   | Name         | Hope Works                      | _                            |           | <b>ø</b> • | Refere      | nce   | HW Q-0123   |              |                | RefTyp      | e Re     | ferenceTyp  | e.       | Referen   | ceNo         |           |      |       |
|             |              | Jula Ritson                     |                              |           | ρ.         |             |       | New quote   |              |                | CASE        | Ca       | N           |          |           |              |           |      | 1     |
|             |              | Default                         |                              | _         | ••         |             |       | 21 May 2018 | • 13:2       | 21:14 🛟        | CTRT        | Co       | itract No   |          | C00000    | 043          |           |      |       |
| Sale        | esman        | Abigal Mine                     |                              |           | • •        |             |       |             |              |                | FNLC        |          | ation       |          |           |              |           |      |       |
| Curr        | rrency       | South African R                 | nd                           |           | • 1        | xchange R   | tate  |             |              | 1:*            | PMNG        |          | ject Refer  |          | 100000    |              | _         |      |       |
| Tax         | x Rate       | 15.00                           |                              |           | p          |             |       |             |              |                | WKOR        | Wo       | IX OF DEF H | eference | W0000     | 1004         |           |      |       |
| Supremation | nPrint (     | DuoteItemType                   | <ul> <li>ItemCode</li> </ul> | Out       | belter     | Description | Wa    | rehouseName | Quantity     | QuantityPerUO  | P UnitType  | UnitCost | Markup      | Discount | ItemPrice | BaseCcyPrice | TaxRate   | Stab | LIE . |
|             |              |                                 |                              |           |            |             |       |             | And out      |                |             |          |             |          |           |              |           |      |       |
| I           |              |                                 |                              |           |            |             |       |             |              |                |             |          |             |          |           |              |           |      |       |
|             |              | Select type                     |                              |           |            |             |       |             |              |                |             |          |             |          |           |              |           |      |       |
| н           |              | Select type                     |                              |           |            |             |       |             |              |                |             |          |             |          |           |              |           |      |       |
| н           |              | Select type                     |                              |           |            |             |       |             |              |                |             |          |             | Sub      | vat       |              |           |      | 0.00  |



# **ADD QUOTE ITEM DETAILS**

• Follow the process in Add New Customer Quote to add the quote item details as required.



| 📲 🔮<br>ave Back Ac | ply Sales Apply          | Project Dele                 | 1 3 3     |             | Print            |          |                |          |          |            |          |           |              |         |         |
|--------------------|--------------------------|------------------------------|-----------|-------------|------------------|----------|----------------|----------|----------|------------|----------|-----------|--------------|---------|---------|
| 1                  | enplate Metho<br>Nantain | dology Iter                  |           |             | ana a            |          |                |          |          |            |          |           |              |         |         |
| ustomer Name       |                          | _                            | . P .     | nat , P     | nce HW Q-0123    | <u>)</u> | -              | RefType  | e Rel    | (erenceTyp | x        | Referen   | cello        |         | -       |
| Contact Name       | and the second second    |                              | ρ.        |             | itus New quote   |          | -              | CASE     | Cat      |            |          |           |              |         |         |
| Commercial         | 10020400                 |                              |           |             | ime 21 May 201   |          | 1:14 :         | CTRT     | Cor      | ntract No  |          | C00000    | 043          |         |         |
|                    | Abigal Mine              |                              | • •       |             | Arrestantion and |          |                | FNLC     |          | ation      |          |           |              |         |         |
| Currency           | South African Ra         | nd                           | •         | Exchange R  | ate              |          | 1:             | PMNG     |          | ject Refer |          |           |              |         |         |
| Tax Rate           | 15.00                    |                              | ρ         |             |                  |          |                | WKOR     | WO       | rk Order R | eterence | W00001    | 004          |         |         |
| uppressOnPrint     | QuoteItemType            | <ul> <li>ItemCode</li> </ul> | Quoteiter | Description | WarehouseName    | Quantity | QuantityPerUOP | UnitType | UnitCost | Markup     | Discount | ItenPrice | BaseCcyPrice | TaxRate | Status  |
|                    |                          |                              |           |             |                  |          |                |          |          |            |          |           |              |         |         |
| H                  |                          |                              |           |             |                  |          |                |          |          |            | _        |           |              | _       | 1.      |
|                    | Parts                    | 19-687                       | Drum      |             | Main Warehouse   | 1.00     | 0.00           | _        | 1 000.00 | 0.00       | 0.00     | 1 200.00  | 1 200.00     | 15,00   | A       |
|                    | Parts<br>Select type     | 19-687                       | Drum      |             | Main Warehouse   | 1.00     | 0.00           |          | 1 000.00 | 0.00       | 0.00     | 1200.00   | 1 200.00     | 15.00   | A       |
|                    | 1917                     | 19-687 ***                   | Dum       |             | Man Warehouse    | 1.00     | 0.00           |          | 100.00   | 0.00       | 0.00     | 120.00    | 1 200.00     | 15.00   |         |
|                    | 1917                     | 19-687 ***                   | Dum       |             | Man Warehouse    | 1.00     | 0.00           |          | 100.00   | 0.00       |          | 1200.00   | 1 200.00     | 15.00   | 1 200.0 |

Help v2024.5.0.7/1.0 - Pg 15 - Printed: 21/08/2024



#### COMMENTS

• Click in this text box and type in a **comment** for this quote. This comment will appear on the **quote document**.



|     | 0          |                                   | X                        |            |              |       |                         |                  |                |          |          |            |          |           |              |         |        |
|-----|------------|-----------------------------------|--------------------------|------------|--------------|-------|-------------------------|------------------|----------------|----------|----------|------------|----------|-----------|--------------|---------|--------|
| ve  |            | emplate Methods                   | oject Delet<br>logy Iter |            |              | Print |                         |                  |                |          |          |            |          |           |              |         |        |
|     |            | Maintain                          | _                        | -          | nat , P      |       | live air                |                  | - 15           | RefType  | 0.0      | ferenceTy  |          | Referen   | calia        | -       | _      |
|     |            | Hope Works                        |                          | ρ.         |              | 1.1   | HW Q-0123               |                  | -              | CASE     | Cat      |            |          | NCIERCI   | UDIV         |         |        |
|     | ntact Name |                                   |                          | <i>p</i> • |              |       | New quote               | -                |                | CTRT     |          | ntract No  |          | C00000    | 043          |         |        |
| (   | Commercial | Abigal Mine                       |                          |            | Date & T     | ime   | 21 May 2018             | • 13:2           | 1:14           | FNLC     | Loc      | ation      |          |           |              |         |        |
|     |            | South African Ran                 | 4                        | _          | Exchange R   |       |                         |                  | 1:             | PMNG     | Pro      | ject Refer | erce     |           |              |         |        |
|     | Tax Rate   | Second and a second second second |                          | p          | Exchange K   | ate   |                         |                  |                | WKOR     | Wo       | rk Order R | eference | W00001    | 1664         |         |        |
|     | 10.03.03   | 91000                             |                          | .181.      |              |       |                         |                  |                |          |          | _          | _        |           |              |         |        |
| 199 |            | Thunda Them Tunta A               |                          |            |              |       |                         |                  |                |          |          |            |          |           |              |         | Status |
| ψp  |            | Constraint/be +                   | ItemCode                 | QuoteIte   | mDescription | Ware  | ehouseName              | Quantity         | QuantityPerUO  | UnitType | UnitCost | Markup     | Discount | ItenPrice | BaseCcyPrice | TaxRate |        |
| 419 | H          |                                   |                          |            | mDescription |       |                         |                  |                |          |          |            |          |           |              |         |        |
| upp |            | Parts<br>Select type              | 19-687 ***               |            | mDescription |       | ehouseName<br>Warehouse | Quantity<br>1.00 | QuantityPerUCK |          | 1 000.00 |            |          | 1 200.00  |              |         |        |
|     |            | Parts                             |                          |            | mDescription |       |                         |                  |                |          |          |            |          |           |              |         |        |
|     |            | Parts                             |                          |            | mDescription |       |                         |                  |                |          |          |            | 0.00     |           |              |         |        |

#### **SAVE QUOTE**

• When you have finished adding the quote details, click on **Save**.



| Mana E       | Equipment and Locati   | ons Contr  |         |               |        |               |             | Version 2.1.0.58 -<br>nd Projects M |          |          | and the second second | Relation 1 | Earlie    | Reported 1   |           | - 6    |
|--------------|--|------------|---------|---------------|--------|---------------|-------------|-------------------------------------|----------|----------|-----------------------|------------|-----------|--------------|-----------|--------|
| Hone E       | -  | 1          |         |               | silve  | elatrick ivi  | antenance a | no rrojecia i Pi                    | nuicum   | 9 11000  | eners .               | 2005       | SEIVICE   | Reporting i  | Utilities | - 0    |
|              | â d  | ' X        |         |               | 5      |               |             |                                     |          |          |                       |            |           |              |           |        |
|              | oply Sales Apply Pr  |            | e Sa    | 121201        | Print  |               |             |                                     |          |          |                       |            |           |              |           |        |
| -            | Template Method<br>Naintain  | ology Iten |         | rmat " P      | rist . |               |             |                                     |          |          |                       |            |           |              |           |        |
| 104-5149-00  | 1. Andrews   | _          |         |               |        |               |             | -                                   | RefTyp   | D.al     | erenceTyp             |            | Referen   | nahla        | -         |        |
| istomer Name |  |            | P       |               | 18 22  | W Q-0123      |             | -                                   | CASE     | Cat      |                       |            | AEICICI   | LEND         |           |        |
| Contact Name |  |            | ρ       |               |        | ew quote      |             |                                     | CTRT     |          | itract No             |            | C00000    | 043          |           |        |
| Commercial   |  |            | -       | Date & T      | ime 2  | 1 May 2018    | * 13:2      | 1:14                                | RUC      |          | ation                 |            | 201102    | 374          |           |        |
|              | Abigal Mine<br>South African Ran   | 4          | -       |               | iii =  |               |             | 1:•                                 | PMNG     |          | ject Refer            | ence.      |           |              |           |        |
| Tax Rate     | <ul> <li>A set of a set of</li></ul> | 0<br>2     | p       | Exchange R    | tate   |               |             |                                     | WKOR     | Wo       | rk Order R            | eference   | W00001    | 1664         |           |        |
| 10.542 (785  | (Hearing)  |            | 19      |               | _      | _             |             |                                     |          | _        | _                     |            |           |              |           | _      |
|              | QuoteItemType *  | ItemCode   | Quotelt | emDescription | Wareh  | iouse/lame    | Quantity    | QuantityPerUOP                      | UnitType | UnitCost | Markup                | Discount   | ItemPrice | BaseCcyPrice | TaxRate   | Status |
| -            | -540   |            | Nice    |               | usia   | (And address) | 112         |                                     |          |          | 100                   | - 12.02    |           |              |           | 30     |
| 0            | Parts<br>Select type   | 19-687     | Drum    |               | Main V | Varehouse     | 1.00        | 0.00                                | -        | 1000.00  | 0.00                  | 0.00       | 1 200.00  | 1 200.00     | 15.00     | A      |
|              |  |            |         |               |        |               |             |                                     |          |          |                       |            |           |              |           |        |
|              |  |            |         |               |        |               |             |                                     |          |          |                       |            |           |              |           |        |

- The new customer quote information will be **saved** and you will return to the **Sales Quotes for Work Order []** listing screen.
- Here you can now view the newly created sales quote details.



|      | Home  | Equipment       | andLoc | abors            | Contrac | t fn   | anot and HR  | R Invento | ry Ma    | interiori | e and Projec | ti Na   | nulacturing | Procurement   | Sales | Service    | Repo  | rting | Utilities | - 1     | 9    |
|------|-------|-----------------|--------|------------------|---------|--------|--------------|-----------|----------|-----------|--------------|---------|-------------|---------------|-------|------------|-------|-------|-----------|---------|------|
| Add  | 2     | X (<br>Delete V | New    | Forward<br>Navig | AO      | cepted | 8            | P         | 2        | Export    | Save Lays    |         |             | 10000         | • Kef | 2          |       |       |           |         |      |
|      |       |                 |        |                  |         |        |              |           |          | -         |              |         |             |               |       |            |       |       |           |         |      |
|      |       | Custome         |        |                  |         | Quot   | eDescription | QuoteValu | e Currer | ncy Exd   | hangeRate    | TaxRate | QuoteDate   | Salesmanham   | e Con | nments     |       |       | QuoteSt   | atus Si | atus |
| QTOO | 00206 | HOP001          |        | Hope Work        | 5       | HWQ    | 2-0123       | 1 380.0   | 0 ZAR    |           | 1.00         | 15.00   | 21 May 2018 | 5 Abigal Mine | Nev   | v drum req | ured. |       | N         | A       |      |
|      |       |                 |        |                  |         |        |              |           |          |           |              |         |             |               |       |            |       |       |           |         |      |
|      |       |                 |        |                  |         |        |              |           |          |           |              |         |             |               |       |            |       |       |           |         |      |

# **PRINT, EMAIL QUOTE**

In the Sales Quotes for Work Order [] listing screen,



- Click on the **row selector** in front of the **quote**.
- Click on **Print**.

|                                       | Ŧ                   |           |           | s              | ales Quoto   | es for Wor              | rk Order W       | /0000166   | 3 - BPO: Ver | rsion 2.1.0. | 69 - Example Co  | ompany  |             |             | _        |          | ×   |
|---------------------------------------|---------------------|-----------|-----------|----------------|--------------|-------------------------|------------------|------------|--------------|--------------|------------------|---------|-------------|-------------|----------|----------|-----|
|                                       | Home E              | Equipment | and Locat | ions Contrac   | Finance a    | and H In                | ventor N         | Maintenan  | ce and Proje | ct Manuf     | facturin Procure | emen Sa | ale Servic  | Reportin I  | Utilitie | - 8      | ×   |
| 4                                     |                     | ×         |           | ¢              | $\checkmark$ | ×                       | R                | 2          |              | 2            |                  | Durb    | an 🔻        | 3           |          |          |     |
| Add                                   | Edit                | Delete    | View      | Forward        | Accepted     | Rejected                | Convert<br>Order |            |              | Save Layo    | out Workspaces   | New     | quote 🔻     | Refresh     |          |          |     |
|                                       | Maint               | ain       |           | Navig "        | F            | Process                 | order            | " Pri      | nt ⊿         | F            | ormat            |         | Current     | 4           |          |          |     |
| Drag a c                              |                     |           |           |                |              |                         |                  |            |              |              |                  |         |             |             |          |          | 6   |
| -                                     | eReferen            | ce Custon | nerCode   | CustomerName   | QuoteDes     | scription               |                  |            | QuoteValue   | Currency     | ExchangeRate     | TaxRate | QuoteDate   | SalesmanN   | ame      | Comments | Quo |
| <ul> <li>9</li> <li>▶ QT00</li> </ul> | 00205               | YES00     | 1         | Young Electric | Drum regi    | uired from <sup>•</sup> | Third Party      | / Supplier | 1 380.00     | ZAR          | 1.00             | 15.00   | 21 May 2018 | Belinda Sha | arman    |          | N   |
|                                       |                     |           |           |                |              |                         |                  |            |              |              |                  |         |             |             |          |          |     |
|                                       |                     |           |           |                |              |                         |                  |            |              |              |                  |         |             |             |          |          |     |
| + c==                                 |                     |           |           |                |              |                         |                  |            |              |              |                  |         |             |             |          |          | ÷   |
| Open W                                | indows <del>•</del> |           |           |                |              |                         |                  |            |              |              |                  |         |             | 2           | 24 Jan 2 | 2019     | 11  |

- A Select the option as desired pop up menu will appear with **Print** and **Email** choices.
- Click on the **radio button** in front of your selected option.
  - In this example, **Print and Email Quote** has been selected.
- Click on Accept.

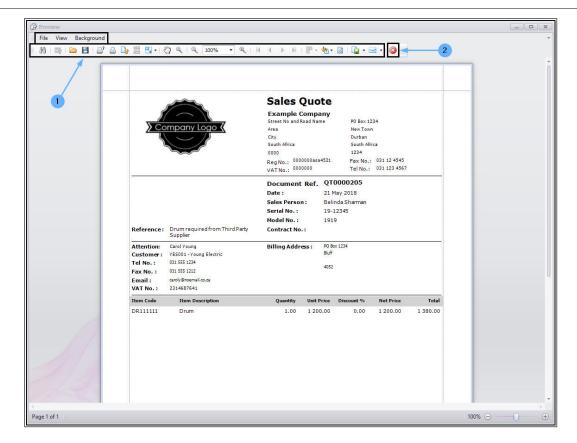


| Sales Quotes for Work Order W00001663 - BPO: Version 2.1.0.69 - Example Company       —       —         Home       Equipment and Locations       Contrac       Finance and H       Inventor       Maintenance and Project       Manufacturin       Procuremen       Sale Servic       Reportin       Utilitie       —       •         Add       Edit       Delete       View       Forward       Accepted       Rejected       Convert<br>Order       Print       Export       Save Layout       Workspaces       Image: Current       Imag | ×   |
|---|-----|
| Add       Edit       Delete       Wew       Forward       Accepted       Rejected       Convert<br>Order       Print       Save Layout       Workspaces       New quote       Refresh         Maintain       Navig       Process       Print       Format       Current       Current         Drog a column header here to group by that column       QuoteReference       CustomerName       QuoteDescription       QuoteValue       Currency       ExchangeRate       TaxRate       QuoteDate       SalesmanName       Commer         Q       Q10000205       YES001       Young Electric       Drum required from Third Party Supplier       1 380.00       ZAR       1.00       15.00       21 May 2018       Belinda Sharman   | ×   |
| Maintain       Navig       Process       Print       Format       Current         Drag a column header here to group by that column       QuoteReference       CustomerCode       CustomerName       QuoteDescription       QuoteValue       Currency       ExchangeRate       TaxRate       QuoteDate       SalesmanName       Commer         Q 0000205       YES01       Young Electric       Drum required from Third Party Supplier       1 380.00       ZAR       1.00       15.00       21 May 2018       Belinda Sharman   |     |
| Otrag a column header here to group by that column         QuoteReference       CustomerCode       CustomerName       QuoteDescription       QuoteValue       Currency       ExchangeRate       TaxRate       QuoteDate       SalesmanName       Commer         Y       QT0000205       YES001       Young Electric       Drum required from Third Party Supplier       1 380.00       ZAR       1.00       15.00       21 May 2018       Belinda Sharman   |     |
| QuoteReference       CustomerCode       CustomerName       QuoteDescription       QuoteValue       Currency       ExchangeRate       TaxRate       QuoteDate       SalesmanName       Commer         •       QT0000205       YES001       Young Electric       Drum required from Third Party Supplier       1 380.00       ZAR       1.00       15.00       21 May 2018       Belinda Sharman         •       V       Select the option as desired   |     |
| Image: Select the option as desired     Image: Select the option as desired       Home  | Que |
| Home  | N   |
| Processing  Print Quote  Enail Quote  Print and Email Quote   |     |
| Copen Windows ▼ 24 Jan 2019   |     |

The **Report Preview** screen will be displayed.

- 1. From here you can **View**, **Print**, **Export** or **Email** the Sales Quote.
- 2. Close this screen when you are done.





As the Report Preview screen is closed the **Email Sales Quote:** [] screen will be displayed.

- **Employee:** This will populate with the employee who is currently logged on to the system. You can click on the drop-down arrow and select an alternative employee, if required.
- From: Type in the email address of the employee above.
- To: This will populate with the email address of the Customer Contact selected on the Quote (the accounts person will be always added to this). You can also type in an additional email address (separated by a semi-colon), or click on the search button and select



from the pop up screen, an additional customer contact(s).

- **CC:** If a group email address has been set up on the quote or accounts contact, that will pull through here. You can also type in an additional email address (separated by a semi-colon), or click on the search button and select from the pop up screen, an additional customer contact(s).
- Attachments: BPO will create a PDF of the quote and attach it automatically. (You can also attach additional documentation by clicking on the search button and browsing for the file you wish to attach.)
- **Subject:** Type in the email subject.
- Message: Type in a message regarding the email.

|                      | Ŧ      |                      |         | Email Sales   | Quote :QT( | 0000205 - BPO: Version 2.1 | .0.69 - Example | Company    |      |        |          | -        |      | 0.000 | × |
|----------------------|--------|----------------------|---------|---------------|------------|----------------------------|-----------------|------------|------|--------|----------|----------|------|-------|---|
| Hom                  | e Equi | ipment and Locations | Contrac | Finance and H | Inventor   | Maintenance and Project    | Manufacturin    | Procuremen | Sale | Servic | Reportin | Utilitie | -    | Ð     | × |
| ×                    |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
| Delete<br>Attachment | Save   | Back                 |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      | essing | _                    |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        | Abigail Milne        |         | *             |            |                            |                 |            |      |        |          |          |      |       |   |
|                      | From   |                      |         |               |            | *                          | 24              |            |      |        |          |          |      |       |   |
|                      |        | caroly@noemail.co    | za      |               |            | • م                        | 10              |            |      |        |          |          |      |       |   |
|                      | CC     |                      |         |               |            | م                          |                 |            |      |        |          |          |      |       |   |
| Attach               | ments  | _QT0000205.pdf       |         |               |            | م                          |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
| Si                   | ubject | 1                    |         |               |            | · 4 .                      | 6               |            |      |        |          |          |      |       |   |
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| Me                   | ssage  |                      |         |               |            | + 4                        | •               |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            | -                          |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            | _               |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
|                      |        |                      |         |               |            |                            |                 |            |      |        |          |          |      |       |   |
| Open Windov          | ws 🕶   |                      |         |               |            |                            |                 |            |      |        |          | 24 Jan 3 | 2019 | ÷     |   |



- 1. When you have added all the required details to this screen,
- 2. click on Save.

| - ·                                | Email Sales Quote :QT0000205 - BPO: Version 2.1.0.69 - Example Company  |          |     | ×    |
|------------------------------------|---|----------|-----|------|
| Home Equi                          | oment and Locations Contrac Finance and H Inventor Maintenance and Project Manufacturin Procuremen Sale Servic Reportin | Utilitie | -   | ₽ ×  |
| Delete<br>Attachment<br>Processing | Back 2  |          |     |      |
| Employee                           | Abigail Mine 👻 *  |          |     |      |
| From                               | amilne@noemailcom. *  |          |     |      |
| То                                 | caroly@noemail.co.za  |          |     |      |
| cc                                 | msmith@noemail.com  |          |     |      |
| Attachments                        | _QT0000205.pdf  |          |     |      |
| Subject                            | Drum Installation Sales Quote   |          |     |      |
| Message                            | Dear Carol<br>Please find attached the sales quote for 1 new drum installation.<br>Kind regards<br>Abigail              |          |     |      |
| Open Windows 🕶                     |   | 24 Jan 2 | 019 | ÷ 1. |

• The email will be sent from the **server** and you will return to the **Sales Quotes for Work Order []** listing screen.



|     |                |                    | Si             | ales Quotes fo | or Work Order V   | VO000166   | i3 - BPO: Ver | sion 2.1.0. | 69 - Example Co | ompany  |                 |                   |          | $\times$ |
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| I I | QT0000205      | YES001             | Young Electric | Drum required  | l from Third Part | y Supplier | 1 380.00      | ZAR         | 1.00            | 15.00   | 21 May 2018     | Belinda Sharmar   |          | N        |
|     |                |                    |                |                |                   |            |               |             |                 |         |                 |                   |          |          |
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#### **Related Topics**

Once the client has approved the quote, it can be processed further:

Convert to Sales Order Add Items to WO

MNU.073.014