

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

SERVICE

CALLS - SALES QUOTES

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the Call Centre Mode notes.

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.

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

- <u>Convert to Sales Order</u>
- Add Items to WO

Ribbon Select Service > Calls



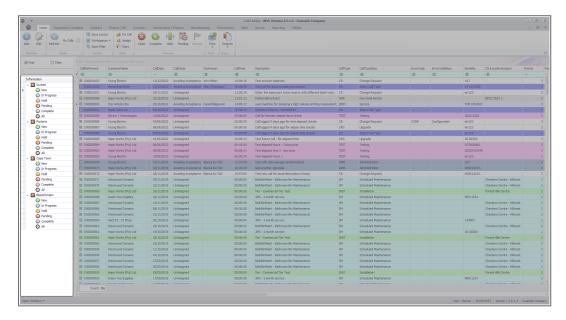
• The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher



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Durban	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Cal Type			19-12/1202		-
O New	E CN0001002	Young Electric	29/11/2022	UnAssigned	nary monpoor	11:29:19	Order the same part twice receive with different batch num		Change Request			19-12/1202 11123		
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🕑 Hold	E CN0000996	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Call Type					
O A1	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
O Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR.	Select Call Type			sin123		
Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Complete	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			5IN32413546		
() AI	E CN0000982	Young Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape Town	E CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Banca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance		16-30-20	test another call email	ADM	Administration			095011015		
Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance		15:57:00	Test new call for email description in body	08	Change Request			095011015		-
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned	Dance bu for	03:00:00	BathtinNaint - Bathroom Bin Maintenance	54	Scheduled Meintenance			000010010	Checkers Centre - Hilcrest	
Complete	E CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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tioemfontein	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
O New	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
In Progress	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
() Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending	E CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	SathSinNaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST.	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Ptv) Ltd	18/09/2019	UnAssigned		08:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hils Centre	
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	Count: 38	6												

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.



• Select the **Call** you wish to work with.



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Durban O New	CN0001002	Saman thas Diner		Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
In Progress	E CN0001001	Young Electric		UnAssigned		11:29:19	Order the same part twice receive with different batch num		Change Request			sin123		
() Hold	E CN0000995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	▶ E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	t SERV	Service			TOP 12340LD		
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O Al	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	■ CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Cal Type			sin123		
(b) Hold	E CN0000985	Hope Works (Pty) Ltd				16:09:13	Test future call - for elapsed time	UPG	Upprade					
Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
 Complete 	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
O Al	E CN0000982			UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape Town	E CN0000975			Awaiting Acceptance	Room Do Talk	11:24:39	Test with site manager email entered	ADM	Administration			107		
O New	E CN0000974	Hope Works (Pty) Ltd				16:30:20	test another call email	ADM	Administration					
 In Progress Hold 	E CN0000972	Hope Works (Pty) Ltd		Awaiting Acceptance		15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000972	Westwood Dynamic		UnAssigned	biarica Du Torc	08:00:00	BathBinNeint - Bathroom Bin Meintenance	5M	Scheduled Maintenance			093011013	Checkers Centre - Hilcrest	
Complete	E CN0000971	Westwood Dynamic Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	5M	Scheduled Maintenance				Checkers Centre - Hildrest	
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New	E CN0000968	Green Tea Supplies		UnAssigned		03:00:00	2MS - 2 month service	574	Scheduled Maintenance			NEW 1234		
() In Progress	E CN0000967	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
() Hold	E CN0000966	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending	E CN0000965	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
 Complete 	E CN0000964	Hack PC - IT Shop		UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O Al	E CN0000963	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
		Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		08:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies				03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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	Count: 38													

• Click on the **Edit** button.

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mation	E CN0001003	Young Bectric		Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samenthas Diner	12/12/2022	Awaiting Acceptance	Nerv Thompson	16:18:30	Test call for account balances manual.	DB	Select Call Type			19-12/1202		
New York	E CN0001001	Young Bectric	29/11/2022			11:29:19	Order the same part twice receive with different batch num	CD.	Change Request			sin123		
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() Hold	E CN0000998	Top Vehicle Hine		Assailing Acceptance	Desciel Releases		Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Pending	E CN0000992	Apple Juice Inc	25/10/2022			14:09:17		DR	Select Cal Type					
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O Al	E CN0000989	Derton / Technologies	13/06/2022			09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Bectric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New In Progress	E CN0000987	Young Electric		UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123		
Hold	■ CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin 123		
Pending	E CN0000985	Hope Works (Pty) Ltd		UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q Al	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
O New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
() Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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Complete Al	E CN0000963	Westwood Dynamic	25/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
0.4	E CN0000963	Hope Works (Ptv) Ltd	19/10/2019			03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200	cauche a cense - ratrest	
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	EE CN0000960	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM					Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000936	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies		UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	III customers						Redemander Redecces Redecision	1914					Mandana Paratas Addanas	
	Count: 386													

- The **Call maintenance : Call ref. -** [call ref number] screen will be displayed.
- Click on the **Quotes** tile.



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pen Windows 🔻							User : Julanda	(17/05	/2022 Ver	sion : 2.5.0.8	Example Co	mpany v2.5.0	3.8

QUOTE LISTING

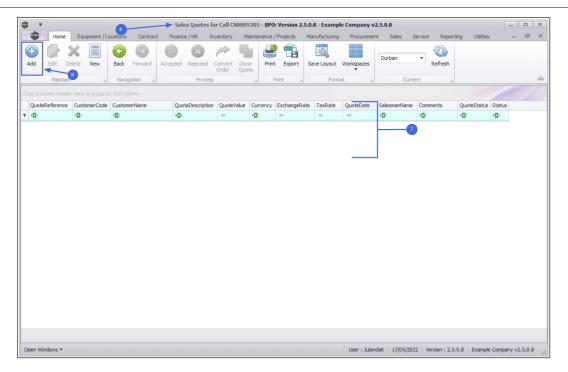
- The Sales Quotes for Call [call ref number] screen will be displayed.
- Any quotes that have already been created for the call, will be listed on this screen.

ADD SALES QUOTE

• Click on Add.

Short cut key: Right click to display the All groups menu list. Click on Add.





- The Add new Customer Quote screen will display.
- You have the option to <u>Apply Sales Template</u> or <u>Apply Project</u> <u>Methodology</u> to the sales quote.

CROSS REFERENCE

- This frame will display all the **linked references** linked to this call, e.g. call number, serial number, etc.
- When a quote is created for a work order from the Call Listing screen, then the **Call Reference** number will be auto linked to the quote.
- When you have completed the quote information, click on **Save**.



ave	Back Ap	Dly Sales Apply Pro	oject Delete logy Item	Save Layout Prin						•				
	Commercial Salesman	Tarryn Snow CUST Type Class Commer Julanda Kessler South African Rand	rcial	a Format Print P Reference P Status • Date & Time • Exchange Rate	CQ001 New Quote 17/05/2022		*	WKOR QUOT ASMN CALL CTRT	ReferenceType Work Order Re Sales Quote Serial No Call Reference Contract No Project Refere	ference V	eferenceNo VO0006263 XN0005305	•		2
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You will return to the Sales Quotes for Call screen.

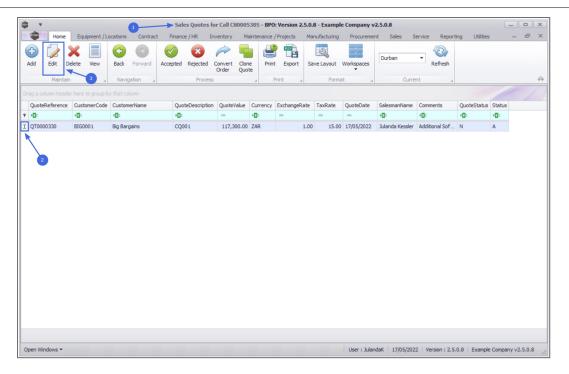
EDIT QUOTE

Only Quotes with a N - New Quote in the Quote Status column can be edited.

- From the Sales Quotes for Call [call ref number] screen,
- Click on the **row** of the Quote you wish to make changes to.
- Click on Edit.

Short cut key:Right click to display the All groups menu list. Click on Edit.





- "The Edit Customer Quote KZQT [] screen will display." on page 2
 - You have the option to Quotes Apply Sales Template as well as Quotes - Apply Project Methodology to the Quote.
 - Make changes to the **Heading Information** or to Items in the **Sales Items grid**.
- Click on Save to save the changes and to return to the Sales
 Quotes for Call listing screen.



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	comment A					-					Gr	VAT and Total			15,300.0	

DELETE QUOTE

Only Quotes with a N - New Quote in the Quote Status column can be deleted.

- From the Sales Quotes for Call [call ref number] screen,
- Click on the **row** of the Sales Quote you wish to **remove**.
- Click on Delete.

Short cut key:Right click to display the All groups menu list. Click on Delete.

• When you receive the **Confirm delete quote** message to confirm;

• Are you sure you want to delete this quote?

• Click on Yes.



Home Home	Equipment / Lo	ocations Contract	Finance / HR Inv	ventory Ma	aintenance	/ Projects Ma	nufacturing	Procureme	nt Sales S	Service Report	ting Utilities		- 8	2
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QT0000330	BIG0001	Big Bargains	CQ001	117,300.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler	Additional Sof	N	A		
QT0000331	BIG0001	Big Bargains	CQ002	1,127.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler		N	A		
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The **Status** for the Sales Quote on the **Sales Quotes for Work Order** screen has changed from **A-Active** to **I-Inactive**.

VIEW QUOTE

A Quote in any **Quote Status** can be Viewed.

- From the Sales Quotes for Call [call ref number] screen,
- Click on the **row** of the Sales Quote you wish to **view**.
- Click on View.



Home Home	Equipment / Lo	cations Contract	Finance / HR Inv	ventory Ma	sintenance	/ Drojacto Ma	nufacturing	Drogurama	nt Sales S	ervice Report	ing Utilities		_ 8	3
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QT0000330	BIG0001	Big Bargains	CQ002	1,127.00		1.00			Julanda Kessler	Additional 301	N	I		

• The View Customer Quote - [quote number] screen will display.

No changes can be made to the information on the Quote.

• Click on **Back** to return to the **Sales Quotes for Customer** listing screen.



Ma	int Form	A Print																
	Customer Name	Rig Bargains		•	Reference	CO002				RefType	Refe	erenceType	R	eferenceNo				_
		Tarryn Snow CUST	OMED CONTAG	ст *		New Quote				WKOR	Work	k Order Refi	erence					î
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FORWARD NAVIGATION

The *Forward* navigation button is only available in the **Invoiced Quote** status after the Sales Quote has been Converted to Order. This feature enables the user to quickly navigate to related documentation. You can navigate to the Sales Orders listing screen where you can view the

- From the Sales Quotes for Call [call ref number] screen,
- Click on the row of the Invoiced Quote you wish to view.
- Click on *Forward* to navigate to the Sales Orders listing screen.

If the Forward navigation is available (not greyed out) then further downstream process documents related to the selected order is available and you can thus navigate to those downstream documents, e.g. the linked **Sales Invoice**, the new deal **Call or Project**.



Home		cations Contract	Finance / HR Inv	entory Ma	aintenance	/ Projects Mar	nufacturing	Procuremen	nt Sales S	Service Report	ting Utilities		- 8
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QT0000330	BIG0001	Big Bargains	CQ001	117,300.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler	Additional Sof	N	A	
QT0000331	BIG0001	Big Bargains	CQ002	1,127.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler		A	A	

BACK NAVIGATION

• The **Back** navigation button is available and by clicking on it, you can navigate back until you return to the **Sales Quotes** listing screen.



Calls - Sales Quotes

Hore Buppment / Locators Contract France / HB Inventory Mentenance / Projects Menufacturing Pocument Sels Service Reporting Utilities - F Add Est Decks Very Accepted Rejected Contract Contract<) ,				Sales Quotes fo	r Call CN0005	305 - BPC): Version 2.5.0.	8 - Example	e Company v	2.5.0.8			-		X
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Open Windows User : JulandaK 17/05/2022 Version : 2.5.0.8 Example Company v2.5.0																

ACCEPT QUOTE

Only quotes with a N - New Quote in the Quote Status can be Accepted.

- From the Sales Quotes for Call [call ref number] screen,
- Click on the **row** of the Sales Quote you wish to **accept**.
- Click on Accepted.

Short cut key:Right click to display the All groups menu list. Click on Accepted.

- When you receive the Input Validation message to confirm;
 - Are you sure you want to update this quote, no.
 [quote number] to be Accepted? Answer 'Yes' to mark it as Accepted.
- Click on Yes.



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Input Validation Are you sure you want to update this quote, no. QT0000331 to be Accepted? Answer Yes' to mark it as Accepted.	000331	BIG0001	Big Bargains	CQ002	1,127.00	ZAR	1.00	15.00	1//05/2022	Julanda Kessler		N	1	
						'k it as Acc	-		No					

The Quote Status for the selected Quote has changed to **[A] - Accepted** on the **Sales Quotes for Customer** listing Screen.

REJECT QUOTE

A quote can be rejected from the Sales Quotes for Customer listing screen where the Quote Status is set to [N] - New Quote or [A] - Accepted.

- From the Sales Quotes for Call [call ref number] screen,
- Click on the row of the Sales Quote that needs to be rejected.
- Click on Rejected.

Short cut key:Right click to display the All groups menu list. Click on Rejected.

- When you receive the Input Validation screen to confirm;
 - Are you sure you want to update this quote, no.
 [quote number] to be Rejected? Answer 'Yes' to mark it as Rejected.



• Click on Yes.

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Open Wir	ndows 🕶								User : Julano	daK 17/05/202	2 Version : 2.5.	0.8 Example	e Company v	2.5.0.8

The Quote Status for the selected Quote has changed to **[R] - Rejected** on the **Sales Quotes for Customer** listing Screen.

CONVERT QUOTE TO ORDER

A quote can be converted to a sales order from the Sales Quotes for Customer listing screen where the Quote Status is set to [N] - New Quote or [A] - Accepted.

- From the Sales Quotes for Call [call ref number] screen,
- Click on the **row** of the Sales Quote that you wish to **convert** to a sales order.
- Click on Convert Order.

Short cut key:Right click to display the All groups menu list. Click on Order.

You will receive**three (3)** prompt messages to confirm the transaction:



- When you receive the first **Order Generation**message to confirm;
 - Are you sure you want to convert quote [quote number], for Customer [customer name] to an order?

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▶ QT0000331	BIG0001	Big Bargains	CQ002	1,127.00		1.00			Julanda Kessler		A	A		
			? Are you Bargain	sure you war s to an order?	nt to conv	ert quote QT000		tomer Big No						
Open Windows -								User : Julan	daK 17/05/202	22 Version : 2.5	.0.8 Example	e Company	v2.5.0.	8

• Click on Yes.

- The second **Order Generation** message will confirmation;
 - Do you wish to close the quote [quote number] off?
 No further orders will be possible from this quote if it is closed.
- Click on Yes.



Home	Equipment / Lo	cations Contract	t Finance / HR Inv	ventory Ma	aintenance	/ Projects Ma	nufacturing	Procureme	nt Sales S	ervice Report	ting Utilities	-	- 8
Add Edit De	lete View	Back Forward		Convert Clon Order Quot		t Export Sa	ive Layout	Workspaces	Durban	• Refresh			
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OT0000330		Big Bargains	CQ001	117,300.00	ZAR	1.00	15.00	17/05/2022	Julanda Kessler	Additional Sof	N	A	
QT0000331		Big Bargains	CQ002	1,127.00		1.00			Julanda Kessler		A	A	
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- The third **Order Generation** message will confirm;
 - Do you wish to view the order created, no. [order number]?
- Click Yes to view the order.
 - Selecting No will leave you on the Sales Quotes for Customer screen.



Calls - Sales Quotes

			Sales Quotes fo	r Call CN0005	305 - BPO	: Version 2.5.0.	8 - Example	Company v	2.5.0.8			_	
Home	Equipment / Lo	cations Contract	Finance / HR Inv	ventory Ma	aintenance	/ Projects Ma	nufacturing	Procureme	nt Sales S	ervice Report	ting Utilities	-	- 8
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OT0000330	BIG0001	Big Bargains	CQ001	117,300.00	-	1.00	15.00	17/05/2022	-	Additional Sof	-	A	
QT0000331	BIG0001	Big Bargains	CQ002	1,127.00		1.00			Julanda Kessler		A	A	
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The **Sales Orders** listing screen will display the a list of all **New Orders** for the **Site** you have selected.

For a detailed handling of this topic refer to Quotes - Convert to Sales Order

CLONE A QUOTE

The nature of cloning a quote is to **save time** when creating new quotes for customers. Using this method, ensures that most of the details of the quote would remain the same. You may wish to **edit** some of the details, for example, the customer, the discount amount or **add** items such as a warranty to the quote.

- From the Sales Quotes for Call [call ref number] screen,
- Select the **row**of the quote you wish to clone.
- Click on Clone Quote.

Short cut key:Right click to display the All groups menu list. Click on Clone.



Home			Sales Quotes for										
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ag a column header l QuoteReference			QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	1
	REC	REC		=	REC	=	=	=	REC.	REC	18:	REC	
-		Big Bargains	CQ001	117,300.00	-	1.00		17/05/2022	-	Additional Sof	-	A	
		Big Bargains	CQ002	1,127.00		1.00			Julanda Kessler		I	A	

• The Add new Customer Quote screen will display.

Lt is important that a **newReference** is entered as it is used to find and identify the quote once it has been processed.

- You can edit any of the **Customer Heading**, **Financial Heading** or **Cross Reference** details, if required.
- Edit the Line Item details, if required.
- You can also choose to apply a Quotes Apply Sales Template, which will be appended to the existing quote items, as well as Quotes - Apply Project Methodology to the cloned quote, if required.

For a detailed handling of this topic refer to Quotes - Clone a Quote

• Click on **Save** when done.



-		4-		Add new	Customer Q	uote - BPO: Versio	n 2.5.0.8	- E	xample Compa	ny v2.5.0.8					_ 0	13
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PRINT QUOTE

- From the Sales Quotes for Call [call ref number] screen,
- Click on the **row**.
- Click on **Print**.



	Ŧ		1		-> 5i	les Quo	tes for	r Call CN00	05305 - BPC): Version 2.5.0.	8 - Example	e Company v	2.5.0.8			L	
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Ad	d Edit De	elete View	Back For		Accepter				one Prin			Workspaces	Durban	• Refresh			
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- The **Select the option as desired** message screen will display with the following options;
 - Print Quote will open the Sales Quote in the Pre-

view screen to view, print, export or email.

- Email Quote will allow you to add recipients and the system will create a .PDF of the Sales Quote as an Attachment to the email.
- Print and Email Quote will display both the

Report Preview and Email screens.

• Click on the **radio button** of the option you require.

When selecting to Email the Quote, the quote will be emailed via the BPO Email Service on the server (not from MS Outlook).

- The example has **Print Quote** selected.
- Click on Accept.

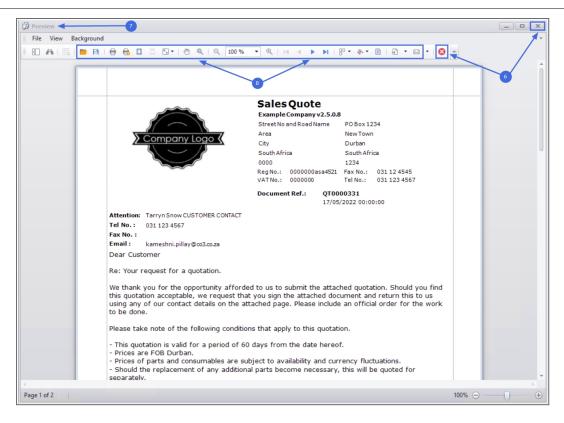


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Ор	n Windows 🔻								User : Jular	ndaK 17/05/202	Version : 2.5	5.0.8 Example	e Company v	2.5.0.8

- The Sales Quote will display in the **Preview**screen.
- From this screen you can make cosmetic changes to the document, as well as Save, Print, Export, Add a Watermark or Email the Sales Quote.
- Click **Close** to return to the **Sales Quotes for Work Order** screen.



Calls - Sales Quotes



MNU.122.010