

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 Compatibility<sup>1</sup>. 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



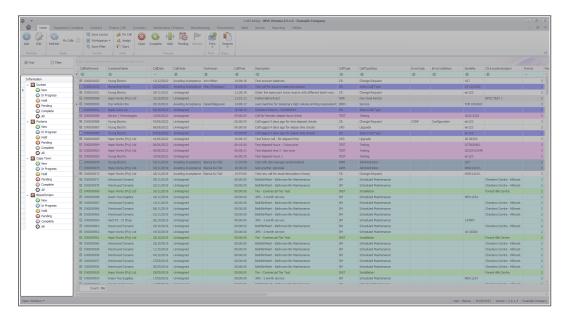
• The **Call Listing** screen will be displayed.

<sup>1</sup>BPO2 v2.5.1.3 or higher



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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		
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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		
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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		-
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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	
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- 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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() 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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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		
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<ul> <li>Complete</li> </ul>	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
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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					
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	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	
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• Click on the **Edit** button.

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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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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	
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	E CN0000957	Westwood Dynamic	27/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
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	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		
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- The **Call maintenance : Call ref. -** [call ref number] screen will be displayed.
- Click on the **Quotes** tile.



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## **QUOTE LISTING**

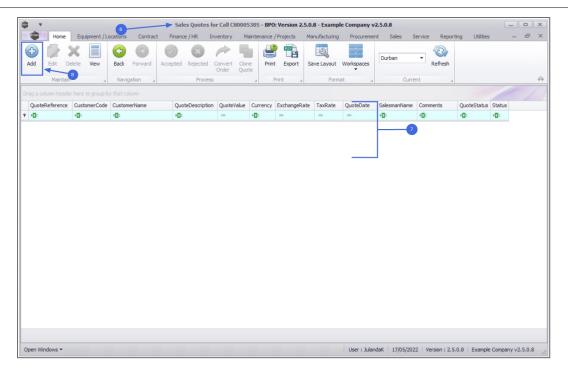
- The Sales Quotes for Call [call ref number] screen will be displayed.
- Any quotes that have already been created for the call, will be listed on this screen.

## **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**.



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You will return to the Sales Quotes for Call screen.

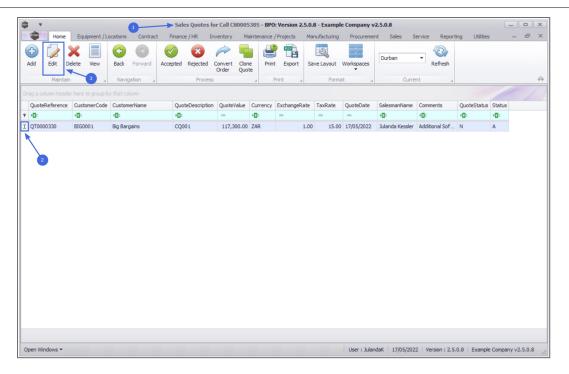
## EDIT QUOTE

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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## **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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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				_
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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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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

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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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						'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.

<b>\$</b> =			0	Sales Quotes fo	or Call CN0005	5 <b>305</b> - BPO	): Version 2.5.0	8 - Example	e Company va	2.5.0.8			_	
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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?

<b>\$</b> =		0	> Sales Quotes fo	r Call CN0005	305 - BPO	D: Version 2.5.0	8 - Example	e Company va	2.5.0.8			_		x
Home	Equipment / Lo	ocations Contract	Finance / HR Inv	ventory Ma	aintenance	/ Projects Ma	nufacturing	Procuremen	nt Sales S	Service Report	ting Utilities		- 8	×
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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
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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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			👩 Do you w	vish to close t	he quote C	losed.			×				

- 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										
	Equipment / Lo	cations Contract	Finance / HR Inv	ventory Ma	aintenance	/Projects Ma	nufacturing	Procuremen	nt Sales S	ervice Report	ing Utilities	s —	- 8
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		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
Home	Equipment / Locat	ions Contra	act Fin	ance / HR	Inventory	Maintenance / Proj	ects M	Mani	ufacturing Pro	ocurement	Sales S	ervice Re	porting l	Julities	- 8	
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8 Customer Name			e e a	Reference	_			Г	RefType	ReferenceTyp	2	ReferenceNo				-
	Tarryn Snow CUST				New Quote			•	WKOR	Work Order Re	ference					*
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	Julanda Kessler		• •	bute & fille	17/03/2022	10120110	•	-		Serial No						U
Currency	South African Rand	ł	▼ Ex	change Rate		1.0	• \$ 00			Call Reference						
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## **PRINT QUOTE**

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



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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.

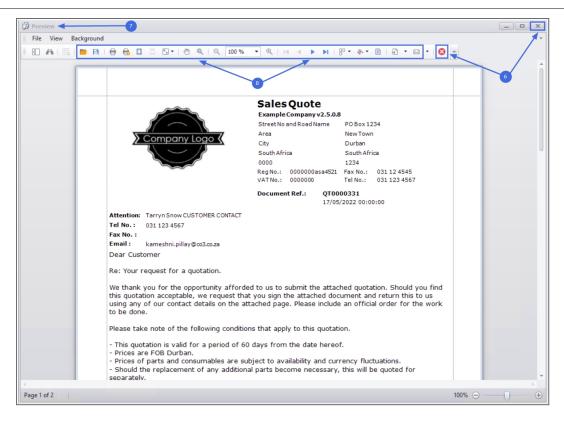


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Ор	n Windows 🔻								User : Jular	ndaK 17/05/202	Version : 2.5	5.0.8 Example	e Company v	2.5.0.8

- 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