

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

SALES STUDIO CONFIGURATION

DELETE QUOTE DEFAULT ITEMS

Default items are items that are set up to be added to <u>all</u> new quotes.

These are items that a company requires to be quoted **every single time**, and therefore need to be linked automatically, so that the salesman does not need to remember to add them. For example, a company may require a consultation fee and a site inspection fee to be included in every sales quote.

Although these items pull through to each new quote, each item can be individually **removed** from each quote or **edited**, if required.

Follow the process below to **delete a** quote default item.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Configuration > Quote Default Items

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Sales Packag	Quote Default Items	Payment Factors		
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THE 'QUOTE DEFAULT ITEMS' SCREEN

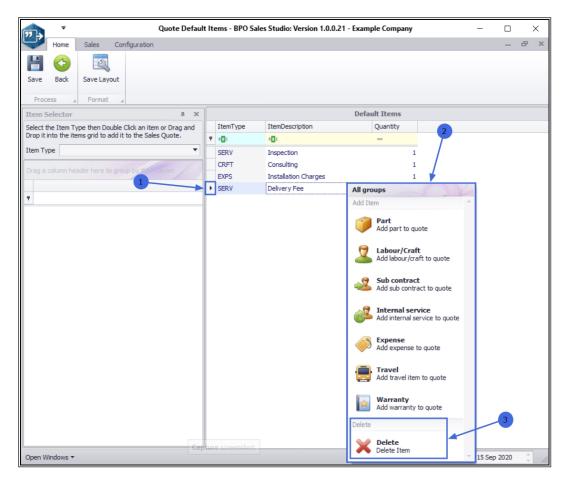
- 1. The Quote Default Items screen will open.
- 2. The **Item Selector** frame is on the left of the screen. This is where you are able to choose individual items to be added to the
- 3. **Default Items** frame, on the right of the screen. This frame, contains items that have already been linked and will appear on each new Sales Quote.
- In this example, an Inspection fee, a Consulting fee, an Installation Charges fee and a Delivery Fee have been set up to link to each new quote.

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Select the Item Type then Double Click an item or Drag and Drop it into the items grid to add it to the Sales Quote.		ItemType	ItemDescription		Quantity					
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Drag a column header here to group by the column	⊩	CRFT	Consulting			1				
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SELECT ITEM TO BE DELETED

- 1. Right click in the row of the item that you wish to delete.
- 2. An All Groups menu will pop up.
- 3. Select **Delete** Delete Item from this menu.

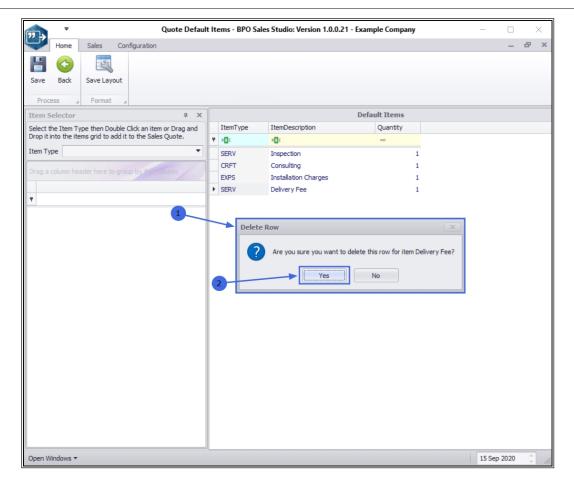


- 1. A **Delete Row** message box will pop up asking;
 - Are you sure you want to delete this row for item [Deliv-

ery Fee]?

2. Click on Yes.

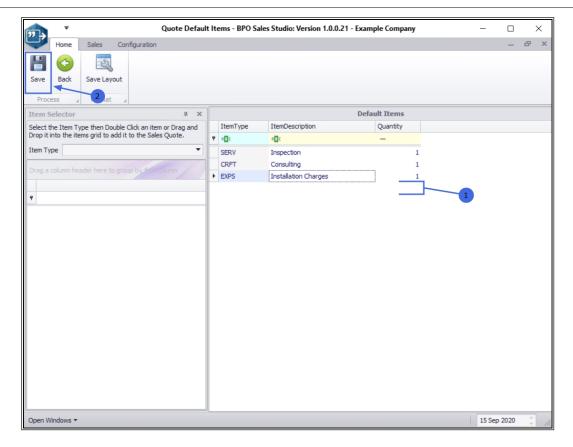




SAVE CHANGES

- The screen will refresh and the selected item will be removed from the Default Items frame.
- 2. Click on Save.





- 1. A **Quote Configuration** message box will pop up informing you that;
 - Default items saved successfully.
- 2. Click on OK.



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You can repeat the process to delete more items, if required.

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