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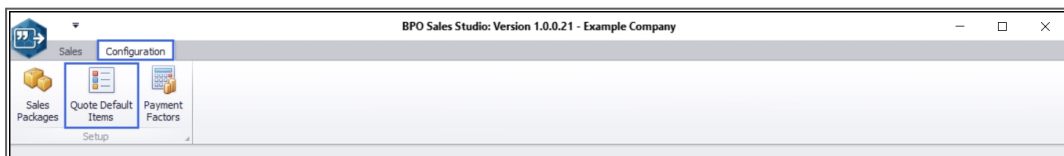
Although these items pull through to each new quote, each item can be individually **removed** from each quote or **edited**, if required.

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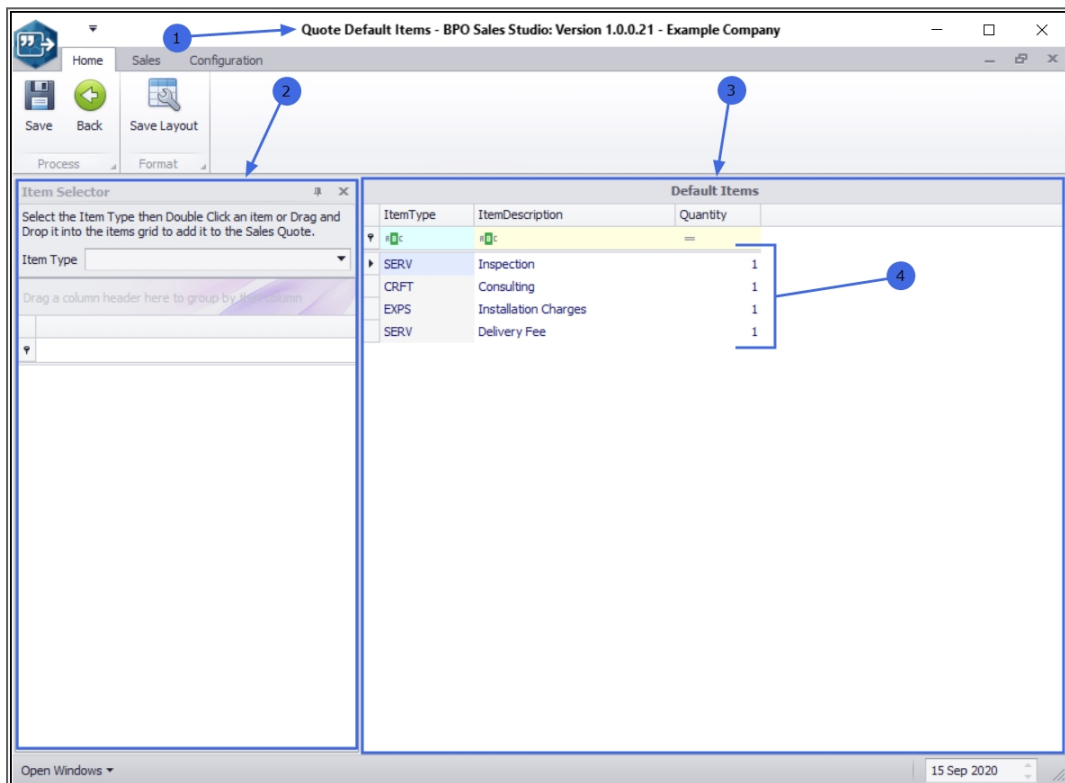
Version Compatibility

- 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

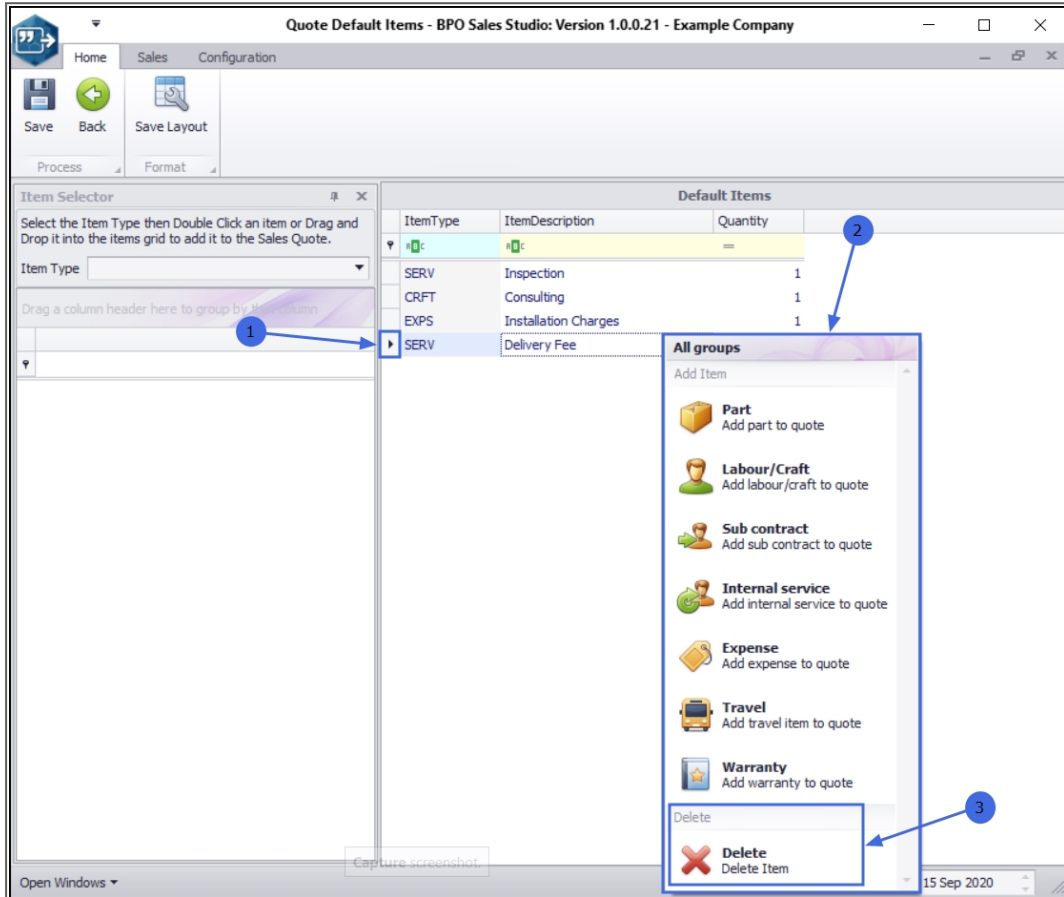**Ribbon Access:** Sales Studio > Configuration > Quote Default Items

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.
4. 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.
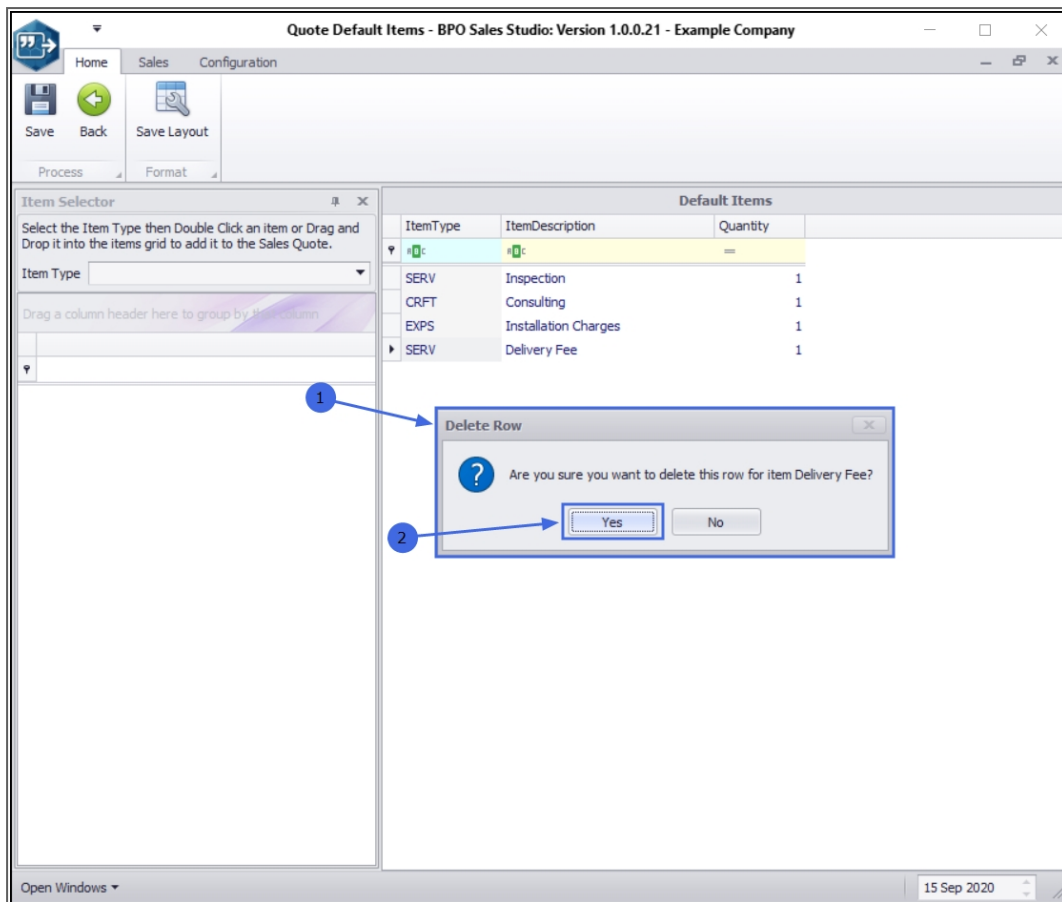
SELECT ITEM TO BE DELETED

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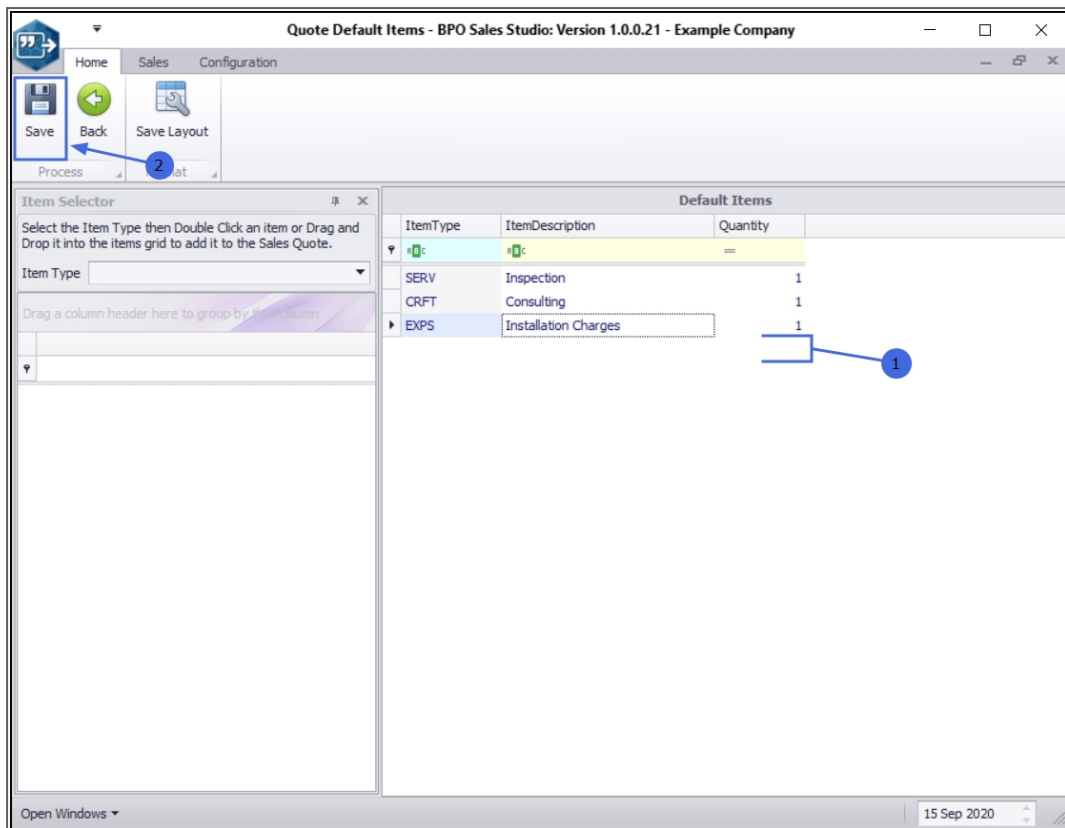3. Select **Delete** - Delete Item from this menu.

1. A **Delete Row** message box will pop up asking;
   - **Are you sure you want to delete this row for item** [Delivery Fee]**?**
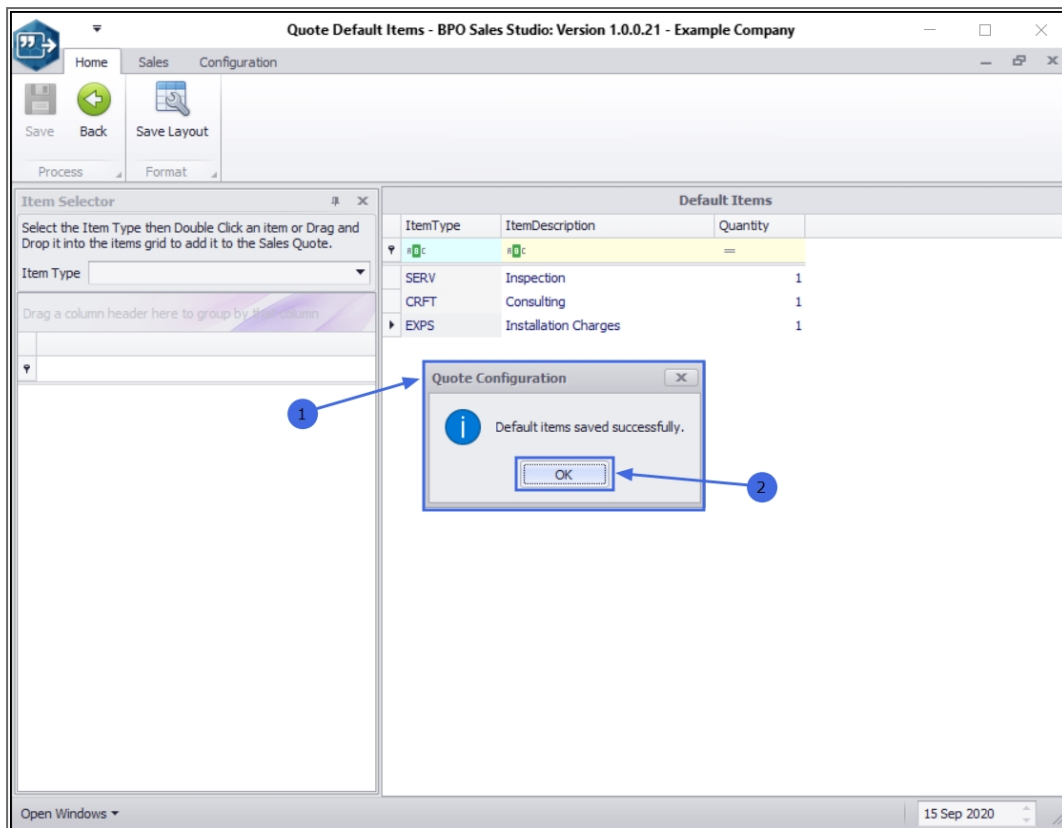2. Click on **Yes**.

SAVE CHANGES

1. 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**.

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

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