

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

SALES

INTRODUCTION TO QUOTES

This manual will give you an overview of the Sales Quotes screen and its related functionality.

A Sales Quote allows a customer to see the costs that will be involved for desired work or parts required. Upon customer approval, the quote can be converted into a Sales Order and then processed as either a <u>POS Sale</u>, <u>New</u> <u>Deal Sale or New Deal Rental</u>. Where additional work or parts are required on a current service call or project, the quote items will be added to the call or project work order to process.

Sales Quotes can be created in BPO, CRM and Sales Studio.

- If created in CRM, the Quote will need to be accepted by the customer before the quote will be active and available for editing in BPO.
- If created in Sales Studio, the Quote can only be Viewed and any changes to the Quote must be done via Sales Studio due to the additional information that can be linked.
- Once the Quotes have been approved in either CRM or Sales Studio, the remainder of the sales process will be done in BPO.

Note the following:

• You must have a <u>customer</u> set up in order to create a quote.



- Quotes can be raised against <u>customers on hold</u>. The System Validation will prevent the creation of a Sales Order until the Customer has been <u>released from hold</u>.
- If the items on a quote are ordered on a regular basis by a customer then the <u>quote can be cloned</u> to save time and ensure continuity.
- The use of Sales Templates is not supported in BPO2, as Sales Studio has an improved template functionality. Sales Templates can be applied to Quotes in CRM only where Sales Studio does not exist.

Ribbon Access: Sales > Quotes

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- 1. The **Sales Quotes** listing screen will display.
- 2. The list of all the Sales Quotes will be filtered using the **Site** and **Status** selected.



Introduction to Quotes

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ł	QT0000158	DER001	Derton / Technologies	test	3,246.72		1.00		07/08/2017	Bianca Du Toit		N	A
l	QT0000109	HOP001	Hope Works (Pty) Ltd	test quote with	1,714.56	USD	10.00	14.00	02/03/2017	Judith Mudzengi		N	A
l	QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	A
ļ	QT0000244	HOP001	Hope Works (Pty) Ltd	1234	17,302.29	ZAR	1.00	15.00	06/11/2018	Bianca Du Toit	Some Notes	N	A
l	QT0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242,921.94	ZAR	1.00	15.00	10/07/2020	Bianca Du Toit	Text	N	A
l	QT0000146	DER001	Derton / Technologies	7412	984.96	ZAR	1.00		29/05/2017	Bianca Du Toit		N	A
l	QT0000152	HOP001	Hope Works (Pty) Ltd	cal goute retest	2,672.16	ZAR.	1.00	1.00	04/07/2017	Judith Mudzengi		N	Α
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۱	QT0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α
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SALES QUOTE STATUS

- 1. The **Sales Quotes** listing screen opens in the **N New Quote** Status by default.
- 2. Click on the Status down arrow to display the Status selection options;
 - L Salesman Released Quote
 - P Manager Approved Quote
 - D Manager Declined Quote
 - A Customer Accepted Quote
 - R Customer Rejected Quote
 - I Invoiced Quote



Introduction to Quotes

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RIBBON TOOL BAR

The Sales Quote ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

QUOTES MAINTAIN BUTTONS

- From the Maintain ribbon section you can choose to <u>Add</u>, <u>Edit</u>, <u>Delete</u> or <u>View</u> a Sales Quote.
- Note that the <u>Forward</u> button is greyed out in the New Quote Status and can be accessed when the Status is set to Quote Invoiced. This gives you the ability to navigate to the invoice created at the end of this sales process.



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1	QT0000146	DER001	Derton / Technologies	7412	984.96	ZAR	1.00	1.00	29/05/2017	Bianca Du Toit		N	Α	
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1	QT0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α	
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QUOTES PROCESS BUTTONS

- On the Process ribbon section you can have Quote <u>Accepted</u> or <u>Rejected</u> or <u>Rejected</u> buttons.
- 2. You can also <u>Convert Order</u> and <u>Clone Quote</u>.

PRINT SALES QUOTE

- 3. From the Print ribbon section you can Print a Sales Quote and or
- 4. **Export** will allow you to export the Sales Quote listing screen in the current Status, to a Microsoft Excel spreadsheet.



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	QT0000175	DER001	Derton / Technologies	ZAR ITEM 10 pe	6,011.22	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit	ZAR, ITEM, 10	. N	A	
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	QT0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242,921.94	ZAR	1.00	15.00	10/07/2020	Bianca Du Toit	Text	N	A	
	QT0000146	DER001	Derton / Technologies	7412	984.96	ZAR	1.00	1.00	29/05/2017	Bianca Du Toit		N	A	
	QT0000152	HOP001	Hope Works (Pty) Ltd	cal goute retest	2,672.16	ZAR	1.00	1.00	04/07/2017	Judith Mudzengi		N	A	
	QT0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A	
	QT0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	A	
	QT0000189	OFF001	Office Supplies Unlimited	test	5,553.93	ZAR	1.00	14.00	15/08/2017	Bianca Du Toit	test	N	A	
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	QT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/2020	Bianca Du Toit		N	A	
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SALES QUOTE LISTING SCREEN

USING FILTERS

For the purpose of this example, the list of Customer Accepted Sales Quotes has been filtered using the Quote Date.

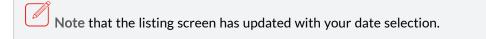
- 1. Change the Status to Customer Accepted Quote.
 - The Sales Listing screen will display only Sales Quotes with a QuoteStatus [A].
- 2. Click on the filter next to **QuoteDate** to display the **Date Filters** selection box.
- 3. Click in the tick box(es) to choose the date(s) you wish to list.
 - The example has 'Last Year' selected.
 - Note that the Sales listing screen updated with the Sales Quotes from Last Year only.



4. Click **Clear Filter** to reset the Listing Screen or click **Close** to continue to the Sales Quotes listing screen with the current filter setting.

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- 1. Click on the **Values** Tab on the Date Filter screen to display a date summary of the Sales Quotes that have been Accepted by Year and Month.
- 2. Click in the tick box(es) next to the Year and Month(s) you would like to list.
 - The example has the year, **2020**, and the months of **April and July** selected.
- 3. Click on **Clear Filter** to reset the listing screen or **Close** to continue with the current filter setting.





Introduction to Quotes

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Related Topics

- Add, Edit, Delete and View Quotes
- Accept and Reject a Quote
- Forward Navigation
- Print and Export a Sales Quote
- Generate a Sales Order
- <u>CRM Basics Quotes</u>
- Clone a Quote
- Creating a Quote from a Call
- Creating a Quote from a Project
- Link Quote Items to a Work Order
- Add new Quote in Sales Studio

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