

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

<b>\$</b> =							BPO: Ver	sion 2.4	.0.11 - Exar	nple Company					_	
	Equipment	t / Locations	Contract	Finance /	HR I	Inventory	Mainb	enance /	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
<u>.</u>	P.						¢									
Customers	Services	Templates	Commercials	POS Lite	Quotes	Orders	Invoices	Credit Notes	Statement Run							
	Master A Processing							4						2		

- 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

A	dd Edit De Maintain	Hete View	Forward Accepted	Rejected Convert Order Process	Clone Quote		port Save Layo	2 at	aces New		Refresh		
									111-1-L				
	QuoteReference		CustomerName	QuoteDescription	QuoteValue		ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	
Ļ	R B C	8 E C	R 🖸 C 🥢 🖌 🥌 🦈	8 <b>0</b> 0	-	R B C	-	-	-	REC	H <b>I</b> C - <b>&gt;</b>	R B C	REC
l	QT0000261	HOP001	Hope Works (Pty) Ltd	7894	1,618.97	ZAR	1.00	0.00	25/07/2019	Bianca Du Toit		N	Α
ł	QT0000192	SAM001	Samanthas Diner	test	376.06		11.00			Bianca Du Toit	test	N	A
ł	QT0000232	HOP001	Hope Works (Pty) Ltd	Option2	10,681.20		1.00		27/06/2018	Bianca Du Toit		N	A
ł	QT0000278	BEA001	Bearing and Shoe	12345	9,292.54	ZAR	1.00	15.00	27/08/2019	Bianca Du Toit		N	Α
ł	QT0000175	DER001	Derton / Technologies	ZAR ITEM 10 pe	6,011.22		1.00		10/08/2017		ZAR, ITEM, 10		A
l	QT0000169	BOT0001	Bothas Networking inc	test	66.12	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	A
ł	QT0000181	HOP001	Hope Works (Pty) Ltd	TEST	427.50		1.00			Bianca Du Toit	test	N	A
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
I	QT0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A
I	QT0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	A
I	QT0000189	OFF001	Office Supplies Unlimited	test	5,553.93		1.00		15/08/2017		test	N	A
l	QT0000118	HOP001	Hope Works (Pty) Ltd	discount comme	17,344.14	ZAR	1.00	14.00	13/04/2017	Judith Mudzengi		N	Α
l	QT0000264	HOP001	Hope Works (Pty) Ltd	test	8,625.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α
۱	QT0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α
	QT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/2020	Bianca Du Toit		N	A
I	QT0000235	HOP001	Hope Works (Pty) Ltd	Copy of Option2	10,106.20	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	Α

### **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

Ac		k lete View	Forward Accepted	Rejected Convert				ut Worksp		Durban New Qu	• ote •	tefresh		
				Order	Quote			3	- 1	Status	A StatusDes	c	1L	
_	Maintain	, k	Navigati "	Process	м.	Print	a F	ot	4	N	New Quote		-	
										L	Salesman Rel		-	
(	uoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteD	D	Manager App Manager Ded		JoteStatus	Statur
	E c	8 <b>0</b> 0	RBC	100	=	# <b>B</b> C	=	=	=	A		cepted Quote	c	REC
	0T0000261	HOP001	Hope Works (Pty) Ltd	7894	1,618.97	ZAR	1.00	0.00	25/07/2	R I	Customer Rej Invoiced Quo			A
	00000192	SAM001	Samanthas Diner	test	376.06		11.00	0.00					1	A
	T0000232	HOP001	Hope Works (Pty) Ltd	Option2	10,681.20		1.00		27/06/20		anca Du Toit		N	A
0	T0000278	BEA001	Bearing and Shoe	12345	9,292.54	ZAR	1.00	15.00	27/08/20	019 Bi	anca Du Toit		N	A
(	T0000175	DER001	Derton / Technologies	ZAR ITEM 10 pe	6,011.22	ZAR	1.00	1.00	10/08/20	017 Bi	anca Du Toit	ZAR, ITEM, 10	N	A
0	T0000169	BOT0001	Bothas Networking inc	test	66.12	USD	10.00	0.00	08/08/20	017 Bi	anca Du Toit		N	A
0	T0000181	HOP001	Hope Works (Pty) Ltd	TEST	427.50	ZAR	1.00	1.00	10/08/20	017 Bi	anca Du Toit	test	N	A
(	T0000158	DER001	Derton / Technologies	test	3,246.72	ZAR	1.00	14.00	07/08/20	017 Bi	anca Du Toit		N	A
0	T0000109	HOP001	Hope Works (Pty) Ltd	test quote with	1,714.56	USD	10.00	14.00	02/03/20	)17 Ju	udith Mudzengi		N	A
0	0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/20	016 Bi	anca Du Toit		N	A
0	T0000244	HOP001	Hope Works (Pty) Ltd	1234	17,302.29	ZAR	1.00	15.00	06/11/20	018 Bi	anca Du Toit	Some Notes	N	A
0	T0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242,921.94	ZAR	1.00	15.00	10/07/20	020 Bi	anca Du Toit	Text	Ν	A
0	0000146	DER001	Derton / Technologies	7412	984.96	ZAR	1.00	1.00	29/05/20	017 Bi	anca Du Toit		Ν	Α
0	T0000152	HOP001	Hope Works (Pty) Ltd	cal qoute retest	2,672.16	ZAR	1.00	1.00	04/07/20	017 Ju	udith Mudzengi		Ν	Α
0	T0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00	15.00	27/05/20	020 Bi	anca Du Toit		Ν	A
0	T0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/20	016 Bi	anca Du Toit		Ν	Α
0	2T0000189	OFF001	Office Supplies Unlimited	test	5,553.93	ZAR	1.00	14.00	15/08/20	017 Bi	anca Du Toit	test	Ν	Α
0	2T0000118	HOP001	Hope Works (Pty) Ltd	discount comme	17,344.14	ZAR	1.00	14.00	13/04/20	017 Ju	udith Mudzengi		Ν	Α
0	0000264	HOP001	Hope Works (Pty) Ltd	test	8,625.00	ZAR	1.00	15.00	25/07/20	019 Bi	anca Du Toit		Ν	Α
0	T0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/20	019 Bi	anca Du Toit		Ν	Α
0	T0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/20	020 Bi	anca Du Toit		Ν	Α
	T0000235	HOP001	Hope Works (Pty) Ltd	Copy of Option2	10,106.20		1.00		27/06/20		anca Du Toit		Ν	Α
1	10000172	ROTOOD 1	Rothac Networking inc	Ve tev orer O211	51 75	LISD	10.00	0.00	08/08/20	117 R	anca Du Toit		N	۸

### **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.



	<b>T</b>						.0.11 - Example							)
1	Home	Equipment / Loc	ations Contract Fina	ance / HR. Invent	ory Mainte	nance / Proj	jects Manufac	turing Pro	ocurement	Sales Service	Reporting	U®i —	8	
-	Ð 🍃 🏅	× 🔳		8					Durb		2			
A	dd Edit Di	elete View	Forward Accepted	Rejected Convert Order	Clone Quote	Print Exp	oort Save Layo	out Worksp	aces New	Quote 🔻	Refresh			
	Maintain		Navigati	Process	quote	Print		ormat		Current				
		/						Second C	-	parrent				
	g a column 1	here to group b				2								
1	QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Statu	s
2	R B C	R E C	RBC	8∎¢	=	R B C	-	-	=	R B C	R <b>E</b> C	8 B C	REC	
(	QT0000261	HOP001	Hope Works (Pty) Ltd	7894	1,618.97	ZAR	1.00	0.00	25/07/2019	Bianca Du Toit		N	Α	
1	QT0000192	SAM001	Samanthas Diner	test	376.06	USD	11.00	0.00	15/08/2017	Bianca Du Toit	test	Ν	Α	
1	QT0000232	HOP001	Hope Works (Pty) Ltd	Option2	10,681.20	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		Ν	A	
1	QT0000278	BEA001	Bearing and Shoe	12345	9,292.54	ZAR	1.00	15.00	27/08/2019	Bianca Du Toit		N	Α	
	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	
1	QT0000169	BOT0001	Bothas Networking inc	test	66.12	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	A	
	QT0000181	HOP001	Hope Works (Pty) Ltd	TEST	427.50	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit	test	N	A	
1	QT0000158	DER001	Derton / Technologies	test	3,246.72	ZAR	1.00	14.00	07/08/2017	Bianca Du Toit		N	A	
1	QT0000109	HOP001	Hope Works (Pty) Ltd	test quote with	1,714.56	USD	10.00	14.00	02/03/2017	Judith Mudzengi		Ν	Α	
1	QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		Ν	A	
	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	
1	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	
1	QT0000146	DER001	Derton / Technologies	7412	984.96	ZAR	1.00	1.00	29/05/2017	Bianca Du Toit		N	Α	
1	QT0000152	HOP001	Hope Works (Pty) Ltd	cal qoute retest	2,672.16	ZAR	1.00	1.00	04/07/2017	Judith Mudzengi		Ν	Α	
1	QT0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A	
1	QT0000095	PAN001	Panda Copiers		800.00	USD	10.00	14.00	04/11/2016	Bianca Du Toit		N	Α	
1	QT0000189	OFF001	Office Supplies Unlimited	test	5,553.93	ZAR	1.00	14.00	15/08/2017	Bianca Du Toit	test	N	Α	
1	QT0000118	HOP001	Hope Works (Pty) Ltd	discount comme	17,344.14	ZAR	1.00	14.00	13/04/2017	Judith Mudzengi		N	Α	
1	QT0000264	HOP001	Hope Works (Pty) Ltd	test	8,625.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α	
1	QT0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α	
1	QT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/2020	Bianca Du Toit		N	A	
1	QT0000235	HOP001	Hope Works (Pty) Ltd	Copy of Option2	10,106.20	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	Α	
	070000172	BOT0001	Rothas Networking inc	ve tev ores O2L	51 75	LISD	10.00	0.00	08/08/2017	Rianca Du Toit		М	٨	

#### **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.



*	+ Home	Equipment / Loc	ations Contract Fina	Sales Qu ance / HR Invent		ersion 2.4	iects Manufac			Sales Service	Reporting	نے – دە		>
1	)	lete View	6	Rejected Convert Process		9	port Save Layo	out Worksp	Durb	an 🔻	Refresh			
			y t 1 slumn	2	3		4							
	QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	s
Ŷ	RBC	REC	RBC	8 🗖 C	-	88C	=	=	-	RBC	R <b>B</b> C	88 C	REC	
I	QT0000261	HOP001	Hope Works (Pty) Ltd	7894	1,618.97	ZAR	1.00	0.00	25/07/2019	Bianca Du Toit		N	Α	
	QT0000192	SAM001	Samanthas Diner	test	376.06	USD	11.00	0.00	15/08/2017	Bianca Du Toit	test	Ν	A	
	QT0000232	HOP001	Hope Works (Pty) Ltd	Option2	10,681.20	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		Ν	A	
	QT0000278	BEA001	Bearing and Shoe	12345	9,292.54	ZAR	1.00	15.00	27/08/2019	Bianca Du Toit		Ν	Α	
	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	
	QT0000169	BOT0001	Bothas Networking inc	test	66.12	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	A	
	QT0000181	HOP001	Hope Works (Pty) Ltd	TEST	427.50	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit	test	N	A	
	QT0000158	DER001	Derton / Technologies	test	3,246.72	ZAR	1.00	14.00	07/08/2017	Bianca Du Toit		N	A	
	QT0000109	HOP001	Hope Works (Pty) Ltd	test quote with	1,714.56	USD	10.00	14.00	02/03/2017	Judith Mudzengi		N	A	
	QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	A	
	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	
	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	
	QT0000118	HOP001	Hope Works (Pty) Ltd	discount comme	17,344.14	ZAR	1.00	14.00	13/04/2017	Judith Mudzengi		N	Α	
	QT0000264	HOP001	Hope Works (Pty) Ltd	test	8,625.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	A	
	QT0000258	HOP001	Hope Works (Pty) Ltd	1234	1,124.47	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	A	
	QT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00	15.00	30/01/2020	Bianca Du Toit		N	A	
	QT0000235	HOP001	Hope Works (Pty) Ltd	Copy of Option2	10,106.20	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	A	
	OT0000177	BOT0001	Rothas Networking inc	LISD zero vat ev	51 75	LISD	10.00	0.00	08/08/2017	Rianca Du Toit		N	٨	

## **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.

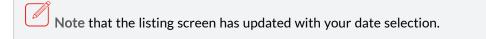
- 1. Change the Status to Customer Accepted Quote.
  - The Sales Listing screen will display only Sales Quotes with a QuoteStatus [A].
- 2. Click on the filter next to **QuoteDate** to display the **Date Filters** selection box.
- 3. Click in the tick box(es) to choose the date(s) you wish to list.
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

Add       Edit       Delete       Wew       Forward       Rejected       Convert       Convert       Convert       Convert       Save Layout       Workspaces       Durban       Customer Ac       Refresh         Maintain       Navigati       Process       Print       Evport       Save Layout       Workspaces       Current       1         Applied Filter : Is last year([QuoteDate])         Yag a column header here to group by that column         QuoteReference       CustomerAame       QuoteDescription       QuoteValue       Currency       ExchangeRate       TaxRate       QuoteDate       TaxRate						Sales Qu	iotes - BPO: N	Version 2.	4.0.11 - Example	e Company	1				_ •	X
Add Edit Dekte Wew Forward Accepted Rejected Convert Cone Maritan Navigat. Process Prot Save Layout Workspace Prot Save Layout Save Layout Workspace Prot Save Layout Save Layout Workspace Prot Save Layout Save Layout Save Layout Save Layout Workspace Prot Save Layout Save Layout Save Layout Save Layout Save Layout Workspace Prot Save Layout Save Lay	-	Home	Equipment /	ocations Co	ontract Fina	ance / HR Invent	ory Mainte	nance / Pro	ojects Manufac	turing Pr	ocurement S	Sales Serv	rice Reporting	u UDi	_ 8	х
Applied Filter: 1 Salex year([QuoteDate])         Yang a column header here to group by that column         QuoteReference: CustomerCode       CustomerName       QuoteDescription       QuoteValue       Currency: ExchangeRate       TaxRate       QuoteDate       Values       Date Filters       QuoteScher       Values       Date Filters       QuoteScher       Values       Date Filters       QuoteScher       QuoteNetWorks       QuoteScher       Values       Date Filters       QuoteScher       QuoteScher       Values       Date Filters       QuoteScher       QuoteScher       Values       Date Filters       QuoteScher       QuoteScher       QuoteScher       Selection       QuoteScher       Selection Scher       QuoteScher       QuoteScher       Selection Scher       Scher       QuoteScher       QuoteScher       QuoteScher       Quote	Add	Edit	** =	Forward	Accepted											
Yrag a column header here to group by that column       QuoteDescription       QuoteDescription       QuoteVelue       Currency       ExchangeRate       Tas/Rate       QuoteDeate       Salesmankame       Commonstance       QuoteState       QuoteDeate       Tas/Rate       Tas/Rate       QuoteDeate       Salesmankame       QuoteState       QuoteState       QuoteDeate       Tas/Rate       Tas/Rate       QuoteDeate       Values       Date Filters       QuoteState       QuoteState       QuoteState       Tas/Rate		Mainta	ain	Navigati	4	Process		Print	. F	Format		Current	4			4
QuoteReferenc       CustomerOde       CustomerName       QuoteValue       Currency       ExchangeRate       TaxRate       QuoteDate       SalesmanSame       Comments       QuoteValue							Applied Filter	r : Is last y	year([QuoteDat	:e])	(	2				
Q1:       Q1:       Q1:       -       Q1:       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -												Ţ				
V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V	Quote	Reference	e CustomerCoo	le CustomerN	ame	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate 🔺	9 Salesman	Name Commer	nts Ou	oteStatus S	Statu
<b>T</b> (1000304 HOP001 Hope Works (Pty) Ltd Test Marc 03 Fr 3,450.00 ZAR 1.00 15.00 10/07/2020                Specific Date Periods                 Ext Works	9 8BC		REC	8 C		8 🖬 C	-	R B C	-	-	-	Values	Date Filters			a 🗖 c
QT0000304         HOP001         Hope Works (Pty) Ltd         Test Marc 03 Fr         3,450.00         ZAR         1.00         15.00         10/07/2020 	-						14,317.50	ZAR	1.00			Specific	Date Periods			A
x ∑ Is last year([QuoteDate])	<ul> <li>QT00</li> </ul>	00304	HOP001	Hope Work	s (Pty) Ltd	Test Marc 03 Fr	3,450.00	ZAR	1.00	15.00	10/07/2020	opeoner	Date Ferious			A
												Next	t Week	Next Year		
												Clear Fl	lter		Close	
	× VI	s last vear	([OuoteDate])									Clear Fi	lter	[	Close	

- 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

-	Ŧ			Sales Qu	otes - BPO: V	ersion 2.4	.0.11 - Example	e Company					x
1	Home	Equipment / Loc	ations Contract Fina	ance / HR Invent	ory Mainte	enance / Pro	jects Manufa	cturing Pr	ocurement	Sales Serv	vice Reporting	0i – 🖻	×
A	dd Edit De	ete View	Forward Accepted	Rejected Convert	Clone			out Works	Dur paces Cus	ban	Refresh		
				Order	Quote			-	Cus				
	Maintain		Navigati "	Process		Print		Format	4	Current	4		2
			Aŗ	oplied Filter : [Quo	teDate]>=	'01/01/20	20' And [Quote	eDate] < '0:	1/01/2021'		1		
													1
	QuoteReference			QuoteDescription	QuoteValue		ExchangeRate	TaxRate	QuoteDate ·		Name Comments	OuoteStatus S	tatus
	A C	a 🛛 c	a 🗖 c	R D C	-	R C	-	-	-	Values	Date Filters	4	C
	QT0000288	OFF001	Office Supplies Unlimited		14,317.50		1.00		17/04/2020	▼ Enter	text to search	A	
	QT0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 Fr	3,450.00	ZAR	1.00	15.00	10/07/2020	· 2		A	
									2		April July	Close	
×	✓ [OuoteDate]	>= '01/01/2020' 4	And [QuoteDate] < '01/01/	2021' 🔻								Edit F	ilter
	en Windows •							1 Inc	ar : Julandak	22/02/2021	Version : 2.4.0.11		
-OF	cir trindows /							Use	a i bula ludi.	22/02/2021	10.3011.2.4.0.11	example company	1

#### **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

BPO.MNU.062