

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

# **SALES**

# **QUOTES - CLONE A QUOTE**

From the Sales Quotes listing screen you have access to the Clone Quote feature, which enables you to make a copy of a selected quote. The quote header details and the line items that have been cloned from the original quote can be edited or removed and new items can be added, as required and therefore saves the user valuable time.

#### Ribbon Access: Sales > Quotes



- 1. From the Sales Quotes listing screen;
- 2. Select the **Site** that contains the quote to be copied
  - The example has **Durban** selected.
- 3. Select the **Status** that contains the quote to be copied (a quote can be cloned in any status),
  - The example has **New Quote** selected.
- 4. Click on the **row** of the quote you wish to clone.
- 5. Click Clone Quote.



-			Sales Quotes - BPO: Version 2.4.0.0 - Example Company ract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reg										
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QT0000294	HOP001	Hope Works (Pty) Ltd	AB02		New Quote	15,377.10	ZAR						
QT0000293	HOP001	Hope Works (Pty) Ltd	AB01_CloneQuote		New Quote	15,377.10	ZAR						
QT0000292	BIG0001	Big Bargains	AB01_SalesStudio		New Quote	241,500.00	ZAR						
QT0000281	BEA001	Bearing and Shoe	1234		New Quote	0.00	ZAR						
4 T0000280	BIL0001	Billys Barn	7896		New Quote	0.00	ZAR						
QT0000278	BEA001	Bearing and Shoe	12345		New Quote	9,292.54	ZAR						
QT0000277	APP0001	Apple Juice Inc	Test Quote		New Quote	6,509.54	ZAR						
QT0000276	BOT0001	Bothas Networking inc	test		New Quote	4,377.75	USD						
QT0000275	BOT0001	Bothas Networking inc	test		New Quote	2,715.00	USD						
QT0000274	APP0001	Apple Juice Inc	123789		New Quote	17,500.47	ZAR						
QT0000273	HOP001	Hope Works (Pty) Ltd	Copy of test		New Quote	238,117.24	ZAR						
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QT0000270	HOP001	Hope Works (Pty) Ltd	test		New Quote	1,124.47	ZAR						
QT0000269	HOP001	Hope Works (Pty) Ltd	test multi level package		New Quote	10,005.00	ZAR						
QT0000268	HOP001	Hope Works (Pty) Ltd	test multi level package		New Quote	10,005.00	ZAR						
QT0000267	HOP001	Hope Works (Pty) Ltd	test multi level package		New Quote	8,625.00	ZAR						
QT0000266	HOP001	Hope Works (Pty) Ltd	Copy of test		New Quote	10,005.00	ZAR						
QT0000265	HOP001	Hope Works (Pty) Ltd	test		New Quote	8,625.00	ZAR						
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The nature of cloning a quote is to **save time** when creating new quotes for customers. On this basis, most of the details of the quote would remain the same, bar the Reference. However, you may wish to **edit** some of the details, for example, the **customer information**, the **discount amount** or **add** items, such as a warranty, to the quote.

# **EDIT QUOTE**

1. The Add new Customer Quote screen will display.

#### **CREATE REFERENCE**

 Ensure that a <u>new Reference</u> is typed for this quote. This is for internal use and is <u>very</u> important as it is used to find and identify the quote once it has been processed.



#### **CUSTOMER AND FINANCIAL HEADER INFORMATION**

 Change the Customer Heading or the Financial Heading information as required. If you need more information on how to edit the Quote Heading Information click on the link to be redirected to Quotes Edit Sales Quote.

#### LINK A CROSS REFERENCE

4. Follow the process to link Cross Reference details for the quote.

**Note** that the cross reference information of the original quote will not clone.

# ADD / EDIT / DELETE LINE ITEMS

5. Individual Item Lines can be <u>added</u>, <u>edited or deleted</u> from the Items data grid as required.

### APPLY SALES TEMPLATE / PROJECT METHODOLOGY

 You can apply a Sales Template which will be appended to the existing quote items, and / or Quotes - Apply Project Methodology to the cloned quote, if required.

# ADD / EDIT A COMMENT

 Add or make changes to the **Comment** for the new quote, if required. The comments field will pull through to the Sales Quote document when it is printed.



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# **SAVE QUOTE**

8. When you have finished editing the Customer Quote, click on **Save**.



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The **Sales Quotes** listing screen will be updated with the New Quote.

# **VIEW QUOTE IN CRM**

The new cloned quote will pull through to **CRM** where you can **Quotes** - **View Quote in CRM**.

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