

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<br>ract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reg |                           |                 |                             |          |           |  |  |  |  |  |
|----------------|-----------------------|--------------------------|---|---------------------------|-----------------|-----------------------------|----------|-----------|--|--|--|--|--|
| Home           | Equipment / Locations | Contract Finance / HR Ir |   | -                         | ement Sales Se  | ervice Reporting            | U        | _ & ×     |  |  |  |  |  |
| 🕀 💋            |                       | 🧭 🕴 🆗                    |   |                           | Durban          | •                           |          |           |  |  |  |  |  |
| Add Edit       | Delete View Forward   |                          | nvert Clone Print Exp<br>rder Quote   | ort Save Layout Workspace | 5 New Quote     | <ul> <li>Refresh</li> </ul> |          |           |  |  |  |  |  |
| Mainta         | ain "Navigati         |                          | Print   | 2<br>Format               | Currer          |                             |          | 6         |  |  |  |  |  |
| Mairita        |                       | 4 FIOCESS                | - A - PING  | a romat                   | 4 Currer        | n                           | 3        |           |  |  |  |  |  |
|                |                       | nn                       |   |                           |                 |                             |          |           |  |  |  |  |  |
| QuoteReference | e 👻 CustomerCode      | CustomerName 5           | QuoteDescription  | DeptName                  | QuoteStatusDesc | QuoteValue                  | Currency | ExchangeR |  |  |  |  |  |
| P #00          | R B C                 | 8 B C                    | 8 E C   | * <b>0</b> ¢              | REC             | =                           | явс      | -         |  |  |  |  |  |
| QT0000295      | APP0001               | Apple Juice Inc          | 123789_CloneQuote   |                           | New Quote       | 17,500.47                   | ZAR      |           |  |  |  |  |  |
| 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      |           |  |  |  |  |  |
| QT0000271      | HOP001                | Hope Works (Pty) Ltd     | test  |                           | New Quote       | 2,504.47                    | ZAR      |           |  |  |  |  |  |
| 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      |           |  |  |  |  |  |
|                | HOP001                | Hope Works (Pty) Ltd     | test  |                           | New Quote       | 8,625.00                    | ZAR      |           |  |  |  |  |  |

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.



| 6 | Т                       | emplate Meth<br>Maintain | odology Ite         |          | Forn  | nat 🖌 Print               | +              |          |                | _                |         |                  |               |           |                       |                       |         |        |
|---|-------------------------|--------------------------|---------------------|----------|-------|---------------------------|----------------|----------|----------------|------------------|---------|------------------|---------------|-----------|-----------------------|-----------------------|---------|--------|
| 0 | ustomer Name            | Hope Works (Pt           | y) Ltd              | Q        | •     | Reference                 | AB02           |          | •              |                  | RefType | R                | ReferenceType |           | Reference             | ReferenceNo           |         |        |
|   | Contact Name            | Tom Watts                |                     | Q        |       | Status                    | New Quote      |          |                | ۲                | WKOR    | V                | Vork Order    | Reference | :                     |                       |         | -      |
|   | Commercial              |                          |                     |          |       | Date & Time               |                |          |                | QUOT Sales Quote |         |                  |               |           |                       |                       |         |        |
|   | Salesman Bianca Du Toit |                          |                     |          |       |                           | ,,             |          |                |                  | ASMN    | S                | ierial No     |           |                       |                       |         |        |
|   |                         |                          |                     |          |       | xchange Rate              | 1.00 🛊 * 💙     |          |                |                  |         | Call Reference   |               |           |                       |                       |         |        |
|   | Tax Rate                |                          |                     | م        |       |                           |                |          |                |                  |         | CTRT Contract No |               |           |                       |                       |         |        |
| Ē |                         |                          |                     |          |       |                           |                |          |                |                  | PMNG    | _                | roject Refe   | _         |                       |                       |         |        |
| Ê | SuppressOnPrint         | QuoteItemType<br>=       | ItemCode<br>#IC     | Quotel   | temL  | escription                | WarehouseName  | Quantity | QuantityPerUOP | Uniti            |         | ost              |               | Discount  |                       | BaseCcyPrice          | TaxRate | status |
|   |                         |                          | -                   | -        | _     |                           | -              |          |                | - C              | =       |                  | =             | =         | =                     |                       |         | -      |
|   |                         | Parts                    | 2020-147K<br>SP2020 | Black to |       | sP2020<br>nt Colour Multi | Main Warehouse | 1.000    | 0.000          |                  |         | 5.917            |               | 0.000     | 415.920<br>12,345.000 | 415.920<br>12,345.000 | 15.000  |        |
|   |                         | Parts<br>Labour          | TECH                | Technic  |       | nt Colour Multi           | Main Warehouse | 1.000    | 0.000          |                  |         | 5.667<br>0.000   |               | 0.000     | 260.470               | 260.470               | 15.000  |        |
|   |                         | Travel                   | 100                 |          |       | xceeding 100 km           |                | 1.000    | 0.000          |                  |         | 0.000            |               | 0.000     | 350.000               | 350.000               | 15.000  |        |
|   |                         | Select type              | 100                 | Iraven   | iot e | xceeding 100 km           |                | 1.000    | 0.000          |                  |         | .000             | 0.000         | 0.000     | 330.000               | 350.000               | 15.000  | A      |
|   |                         |                          |                     | 5        |       |                           |                |          |                |                  |         |                  |               |           |                       |                       |         |        |

# **SAVE QUOTE**

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



|  |                             |                      |                  |   | Add new Cus            | stomer Quo    | e - BPO: Version 2.4.0.11 - Example Company |          |              |           |               |                                  |                  |             |           |           |    |
|--|-----------------------------|----------------------|------------------|---|------------------------|---------------|---|----------|--------------|-----------|---------------|----------------------------------|------------------|-------------|-----------|-----------|----|
|  | Home                        | Equipment / Location | ons Contrac      | Finance / HR. Inve  | aintenance / Pr        | ojects        | Manufac                                     | turi     | ng Procureme | ent Sales | Service       | Reporting                        | UDa              | - 8         |           |           |    |
| Save B                                 | 9                           | Jy Sales Apply Pr    | oject Delete     | S   | ave Layout Print       |               |   |          |              |           |               |                                  |                  |             |           |           |    |
|  |                             | mplate Methodo       |                  |   |                        |               |   |          |              |           |               |                                  |                  |             |           |           |    |
|  |                             | aintain              |                  | 4   | Format J Print         | 4             |   |          |              |           |               |                                  |                  |             |           |           |    |
| Custom                                 | er Name                     | Bits and Bytes       |                  | P         Reference         CloneQuote           P         *         Status         New Quote |                        |               | -AB02                                       | 802      |              |           |               | ReferenceType                    |                  | ReferenceNo |           |           |    |
| Conta                                  | ict Name                    | Josh Meyers          |                  |   |                        |               |   | + +      |              |           | /ork Order Re | eference                         |                  |             |           | â         |    |
| Com                                    | nmercial                    | Type Class Comme     | ercial           | -   | Date & Time            | ▼ 13:5        | 3:55  | :        |              |           | Sales Quote   |                                  |                  |             |           |           |    |
| Salesman Abigail Milne                 |                             |                      | <b>*</b> *       |   |                        |               |   | - I      |              |           | Serial No     |                                  |                  |             |           |           |    |
| c                                      | Currency South African Rand |                      | -                | Exchange Rate   |                        | 1.00          |   | ÷ *      | CALL         |           |               |                                  |                  |             |           |           |    |
| т                                      | Tax Rate                    | 15.00                |                  | Q   |                        |               |   |          |              |           |               | Contract No<br>Project Reference |                  |             |           |           |    |
| SuppressOnPrint QuoteItemType ItemCode |                             |                      |                  | 0.0   | teItemDescription      | WarehouseName |   | Quantity | QuantityPerL |           | UnitType      | UnitCost                         | Markup           | Discount    | ItemPrice |           |    |
|  |                             | =                    | I C              | 800   |                        |               | NUC   | anc      | quantity     |           |               | RDc                              | =                | mai kup     |           | =         |    |
| 1                                      |                             | Parts                | 2020-147K        | -   | k toner SP2020         |               | Main Wareho                                 | 000      | 1.000        |           | 0.00          |                                  | 415.91           | 7 0.000     | 0.000     | 415.92    | 20 |
|  |                             | Parts                | SP2020           |   | 020 Sprint Colour Muli | Main Wareho   |   | 1.000    |              | 0.00      |               | 2,816.66                         |                  |             |           |           |    |
|  |                             | Labour               | TECH             |   | hnician                | ar ancourt    | Than that cho                               | 000      | 1.000        |           | 0.00          |                                  | 0.00             |             |           |           |    |
|  |                             | Travel               | 100              |   | vel not exceeding 100  | ) km          |   |          | 1.000        |           | 0.00          |                                  | 0.00             |             |           |           |    |
|  |                             | Warranty             | F1YW             | Full 1 Year Warranty - unit and part  |                        |               |   | 1.000    |              | 0.0       |               | 000                              | 0.0              | 0.000       | 0.000     | 2,000.00  | 00 |
|  | 8                           | Select type          |                  |   |                        |               |   |          |              | T.        |               |                                  |                  |             |           |           |    |
|  |                             |                      |                  |   |                        |               |   |          |              |           |               |                                  |                  |             |           |           |    |
| Com                                    | nment A                     | 302 quote cloned fo  | or different cus | tome  | r                      |               | *   |          |              |           |               |                                  | Sub Total<br>VAT |             |           | 2,305.71  |    |
|  |                             |                      |                  |   |                        |               | ~   |          |              |           |               | Gr                               | rand Total       |             |           | 17,677.10 |    |
|  |                             |                      |                  |   |                        |               |   |          |              |           |               |                                  |                  |             |           |           | 1  |

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**.

MNU.062.004