

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

SALES

QUOTES – APPLY SALES TEMPLATE

Sales Templates can be set up for **bundles** or **sets** that are usually sold together.

For example:

- A machine model plus
 - its standard accessories,
 - toners
 - and service charges.

This template can then be used when creating a new **Sales Quote**. The quote can be amended, where required, for instance the **item quantities** can be updated.

Unit costs are updated on the **Sales Quote** when applied, and the selling price is calculated based on the unit cost of the item. The selling price can also be amended on the Quote.

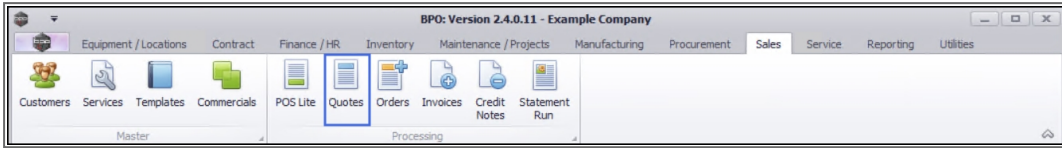
One or multiple Sales Templates can be applied to a Quote.

Multiple Sales Templates and Project Methodologies can be applied to the same Sales Quote.

A Sales Template can be applied when a Quote is created, or when Editing a Quote.

For the purpose of this manual, a Sales Template will be applied while creating a New Quote.

Ribbon Access: Sales > Quotes



1. The **Sales Quotes** listing screen will display.
2. Select the **Site** you wish to work in.
 - The example has **Durban** selected.

ADD QUOTE

3. Click on **Add**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add**.

The screenshot shows the 'Sales Quotes' listing screen. The ribbon is set to 'Sales' > 'Quotes'. The 'Add' button is highlighted with a blue circle and a number '3'. A right-click icon is shown with a blue circle and a number '1'. The 'All groups' menu is open, showing 'Durban' selected with a blue circle and a number '2'. The main area displays a table of quotes with columns for QuoteReference, CustomerCode, CustomerName, QuoteDescription, QuoteValue, Currency, ExchangeRate, TaxRate, QuoteDate, SalesmanName, Comments, QuoteStatus, and Status.

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate | SalesmanName | Comments | QuoteStatus | Status |
|----------------|--------------|---------------------------|---------------------|------------|----------|--------------|---------|------------|-----------------|------------------|-------------|--------|
| QT0000261 | HOP001 | Hope Works (Pty) Ltd | 7894 | 1,618.97 | ZAR | 1.00 | 0.00 | 25/07/2019 | Bianca Du Toit | | N | A |
| QT0000192 | SAM001 | Samanthas Diner | test | 376.06 | USD | 11.00 | 0.00 | 15/08/2017 | Bianca Du Toit | test | N | A |
| QT0000232 | HOP001 | Hope Works (Pty) Ltd | Option2 | 10,681.20 | ZAR | 1.00 | 15.00 | 27/06/2018 | Bianca Du Toit | | N | A |
| QT0000278 | BEA001 | Bearing and Shoe | 12345 | 9,292.54 | ZAR | 1.00 | 15.00 | 27/08/2019 | Bianca Du Toit | | N | A |
| 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 quote 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 | A |
| 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 |

QUOTE HEADER

4. The **Add new Customer Quote** screen will display.

Complete the **Customer Heading**, the **Financial Heading** and **Cross Reference Information**. For a detailed handling of this topic refer to [Quotes - Add Sales Quote](#).

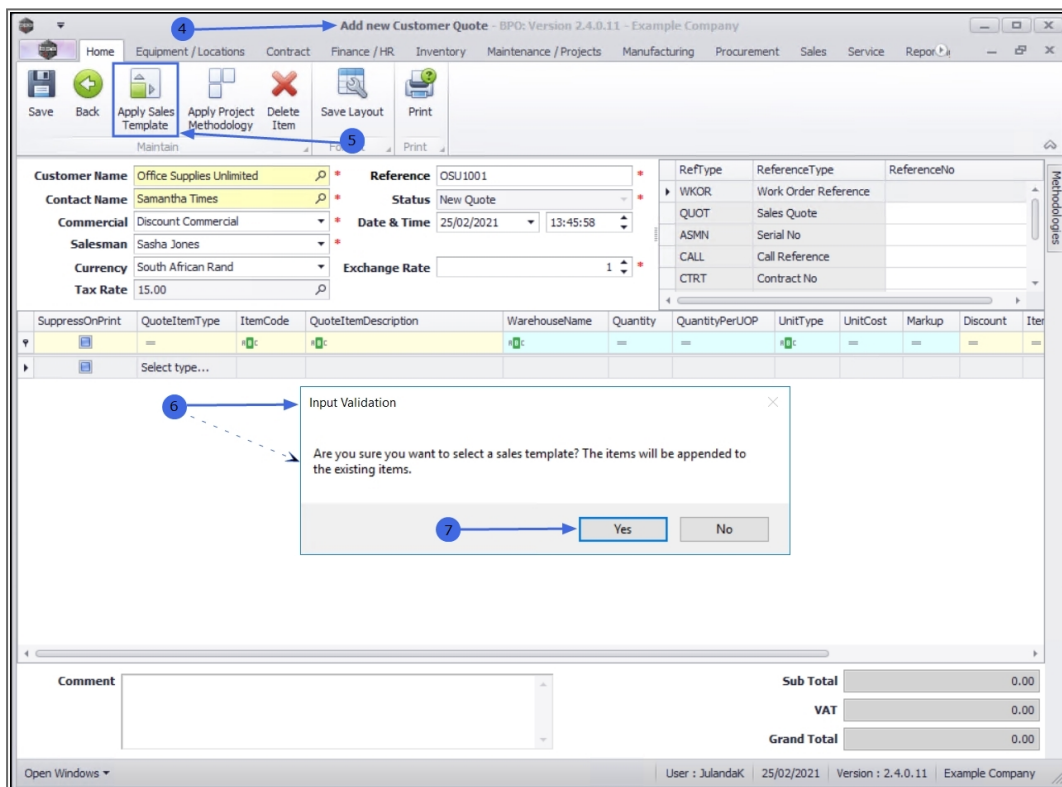
APPLY SALES TEMPLATE

5. Click **Apply Sales Template**.

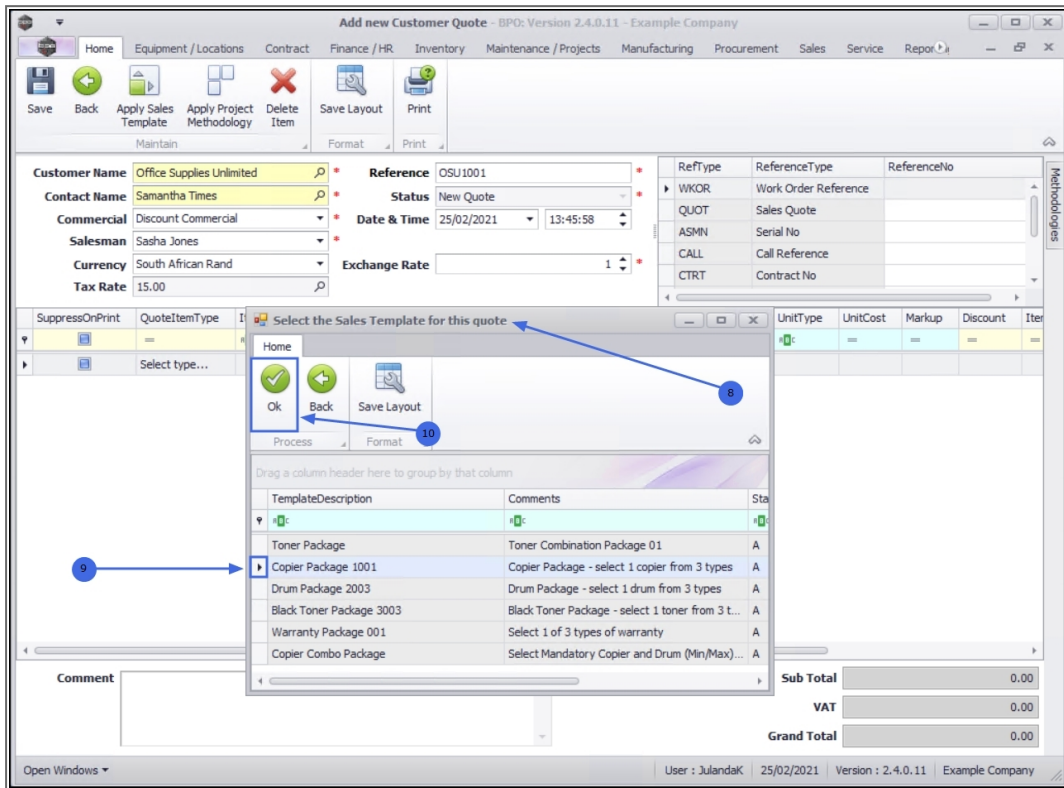
6. When you receive the **Input Validation** message confirming;

- **Are you sure you want to select a sales template? The items will be appended to the existing items.**

7. Click on **Yes**.



8. The **Select the Sales Template for this quote** screen will display.
9. Click on the **row** of the **Sales Template** you wish to apply.
10. Click on **OK**.



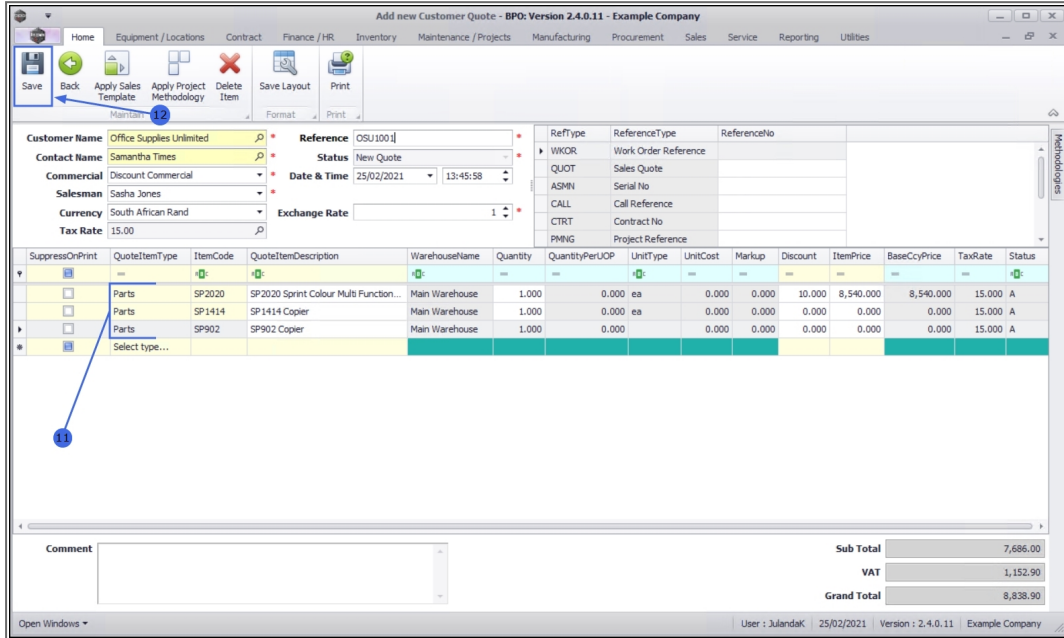
QUOTE ITEMS DATA GRID

11. The **Items** data grid is populated with the items already set up from the Sales Template selected.

- Ensure that all the **selling prices** have been completed.
- You can add more than one Sales Template to the quote.
- Individual Quote items can be added or deleted. Click on the link if you need assistance on how to [Quotes - Add Sales Quote](#) or on how to [Quotes Edit Sales Quote](#).
- Use the **"View Stock"** on page 10 feature to ensure that the items you wish to include on the Quote, are available.

SAVE SALES QUOTE

12. When you have completed all the relevant information for the quote, click on **Save**.



13. You will return to the **Sales Quotes** listing screen.

14. The New Quote can now be viewed in the **New Quote Status**.

Sales Quotes - BPD: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | View | Forward | Accepted | Rejected | Convert Order | Clone Quote | Print | Export | Save Layout | Workspaces | Durban | New Quote | Refresh

Maintain | Navigat... | Process | Print | Format | Current

Drag a column header here to group by that column

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate | SalesmanName | Comments | QuoteStatus | Status |
|----------------|--------------|---------------------------|-----------------------|------------|----------|--------------|---------|------------|------------------|----------------------|-------------|--------|
| QT0000321 | OFF001 | Office Supplies Unlimited | OSU1001 | 8,838.90 | ZAR | 1.00 | 15.00 | 25/02/2021 | Sasha Jones | Full installation... | N | A |
| QT0000178 | PAN001 | Panda Copiers | USD, 1, 10, ITEM | 270.04 | USD | 10.00 | 1.00 | 10/08/2017 | Bianca Du Toit | | N | A |
| QT0000129 | HOP001 | Hope Works (Pty) Ltd | Call - Quote tes... | 14,903.82 | ZAR | 1.00 | 1.00 | 25/05/2017 | Judith Mudzengi | | N | A |
| QT0000155 | HOP001 | Hope Works (Pty) Ltd | test | 2,210.59 | ZAR | 1.00 | 1.00 | 28/07/2017 | Bianca Du Toit | | N | A |
| QT0000086 | APP0001 | Apple Juice Inc | iouyhj | 8,347.60 | ZAR | 1.00 | 14.00 | 01/11/2016 | Belinda Sharm... | | N | A |
| QT0000135 | HOP001 | Hope Works (Pty) Ltd | Call - Quote v2... | 493.62 | ZAR | 1.00 | 1.00 | 25/05/2017 | Judith Mudzengi | | N | A |
| QT0000112 | HOP001 | Hope Works (Pty) Ltd | 546899732 | 4,617.00 | ZAR | 1.00 | 14.00 | 17/03/2017 | Judith Mudzengi | | N | A |
| QT0000292 | BIG0001 | Big Bargains | AB01_SalesStudio | 241,500.00 | ZAR | 1.00 | 15.00 | 27/05/2020 | Abigail Milne | | N | A |
| QT0000298 | HOP001 | Hope Works (Pty) Ltd | AB014 | 15,392.35 | ZAR | 1.00 | 15.00 | 03/06/2020 | Bianca Du Toit | Quote doned... | N | A |
| QT0000149 | HOP001 | Hope Works (Pty) Ltd | Retest 2 | 6,156.00 | ZAR | 1.00 | 1.00 | 19/06/2017 | Judith Mudzengi | | N | A |
| QT0000190 | BOT0001 | Bothas Networking inc | | 533.63 | USD | 10.00 | 0.00 | 15/08/2017 | Bianca Du Toit | | N | A |
| QT0000236 | APP0001 | Apple Juice Inc | 1234 | 1,035.00 | ZAR | 1.00 | 15.00 | 27/06/2018 | Bianca Du Toit | | N | A |
| QT0000113 | HOP001 | Hope Works (Pty) Ltd | qote13 | 6,156.00 | ZAR | 1.00 | 14.00 | 04/04/2017 | Bianca Du Toit | | N | A |
| QT0000184 | OFF001 | Office Supplies Unlimited | bpo2 credit not... | 196.65 | ZAR | 1.00 | 1.00 | 10/08/2017 | Bianca Du Toit | | N | A |
| QT0000267 | HOP001 | Hope Works (Pty) Ltd | test multi level p... | 8,625.00 | ZAR | 1.00 | 15.00 | 26/07/2019 | Bianca Du Toit | | N | A |
| QT0000230 | APP0001 | Apple Juice Inc | Copy of New123 | 4,597.20 | ZAR | 1.00 | 15.00 | 21/09/2016 | Bianca Du Toit | Test custom r... | N | A |
| QT0000067 | DER001 | Derton / Technologies | test | 570.00 | ZAR | 1.00 | 14.00 | 23/11/2015 | Belinda Sharm... | | N | A |
| QT0000313 | BIT001 | Bits and Bytes | CloneQuote-AB02 | 17,677.10 | ZAR | 1.00 | 15.00 | 15/07/2020 | Abigail Milne | AB02 quote d... | N | A |
| QT0000276 | BOT0001 | Bothas Networking inc | test | 4,377.75 | USD | 10.00 | 0.00 | 30/07/2019 | Bianca Du Toit | | N | A |
| QT0000121 | HOP001 | Hope Works (Pty) Ltd | test | 22,852.44 | ZAR | 1.00 | 14.00 | 20/04/2017 | Bianca Du Toit | | N | A |
| QT0000127 | HOP001 | Hope Works (Pty) Ltd | commercial test | 834.20 | ZAR | 1.00 | 1.00 | 10/05/2017 | Judith Mudzengi | | N | A |
| QT0000319 | ABCKY2123 | ABC Shoe Co | ttttttttttt | 3,000.00 | ZAR | 1.00 | 0.00 | 19/10/2020 | Abigail Milne | | N | A |

Open Windows | User : Julandak | 25/02/2021 | Version : 2.4.0.11 | Example Company

MNU.062.006