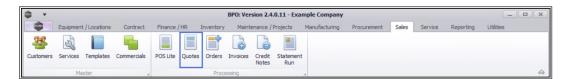


We are currently updating our site; thank you for your patience.

## **SALES**

## **QUOTES - EDIT SALES QUOTE**

Ribbon Access: Sales > Quotes



- 1. The **Sales Quotes** listing screen will display.
- 2. Select the **Site** where the quote can be located.
  - The example has **Durban** selected.
- 3. Ensure that the **Status** is set to **New Quote**.
- 4. Click on the **row** of the quote you wish to **edit**.
- 5. Click on Edit.

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



Ad	d Edit De Maintain	Hete View	Forward Accepted	Rejected Convert Order Process	Clone Quote	_	Dort Save Layo	out Worksp	aces New		Refresh		
4	a column header	here to group by		QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDa A	SalesmanName	Comments	QuoteStatus	Statu
÷		REC		AD:	=	REC.	=	=	=		REC.	800	REC
1		BIL0001	Billys Barn	7896	0.00	ZAR	1.00	15.00	24/01/2020	Bianca Du Toit		N	A
	OT0000281	BEA001	Bearing and Shoe	1234	0.00	ZAR	1.00		30/01/2020	Bianca Du Toit		N	A
(	- 2T0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00		27/05/2020	Bianca Du Toit		N	A
(	QT0000292	BIG0001	Big Bargains	AB01_SalesStudio	241,500.00	ZAR	1.00	15.00	27/05/2020	Abigail Milne		N	A
(	QT0000293	HOP001	Hope Works (Pty) Ltd	AB01_CloneQu	15,377.10	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	Α
4	QT0000294	HOP001	Hope Works (Pty) Ltd	AB02	15,377.10	ZAR	1.00	15.00	27/05/2	Bianca Du Toit		N	A
(	QT0000298	HOP001	Hope Works (Pty) Ltd	AB014	15,392.35	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned,	N	A
(	QT0000299	HOP001	Hope Works (Pty) Ltd	AB016	15,662.06	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote doned,	N	A
0	QT0000296	HOP001	Hope Works (Pty) Ltd	AB012	15,855.41	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned	N	A
(	QT0000297	HOP001	Hope Works (Pty) Ltd	AB13	15,825.45	ZAR.	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned quote	N	Α
(	QT0000300	HOP001	Hope Works (Pty) Ltd	AB017	259,864.04	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned a quot	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	Α
(	QT0000302	HOP001	Hope Works (Pty) Ltd	Test Marc 02	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A
(	QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test M	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A
4	QT0000307	BIG0001	Big Bargains	this is from BPO	621.00	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A
1	QT0000310	DER001	Derton / Technologies	Test Matt03	299.54	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	Α
(	QT0000309	HOT0001	Hot Pink	Test Matt02	2,150.50	ZAR.	1.00	15.00	13/07/2020	Abigail Milne		N	A
0	QT0000306	SWE0001	Sweets	Test Default Ite	2,794.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	Α
(	QT0000311	KIN0001	King Copiers	KC001	12,075.00	ZAR	1.00	15.00	14/07/2020	Abigail Milne	Test link to BP	N	Α
0	QT0000312	BIG0001	Big Bargains	BB001	6,100.89	ZAR	1.00	15.00	14/07/2020	Abigail Milne		N	Α
(	QT0000313	BIT001	Bits and Bytes	CloneQuote-AB02	17,677.10	ZAR	1.00	15.00	15/07/2020	Abigail Milne	AB02 quote d	N	Α
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6. The Edit Customer Quote - QT[quote number] screen will display.

## **QUOTE HEADER**

#### **Customer Heading**

- **Customer:** Click on the **search button** to select an alternative Customer from the **Select a customer for this quote** list.
- **Contact Name:** Click on the **search button** to select an alternative contact for the quote.
- **Commercial:** To change the **commercial**<sup>1</sup> for the quote, click on the down **arrow** to select the required commercial from the list.

<sup>1</sup>Commercial is the mark up structure for the item. The original price of the item, including the company profit margin



- The <u>commercial linked to the selected customer</u> would have auto populated to the commercial field.
- **Salesman:** To change the salesman responsible for the quote, click on the down **arrow** to select the salesman from the list.

This is an important record for commission purposes.

• **Reference:** Add or make the necessary change to the reference for the quote.

The reference is <u>very important</u> for internal use as it is used to find and identify the quote once it has been processed.

- **Status:** This field will default to '**New Quote**' and cannot be changed.
- **Date & Time:** Date and time will display the date and time the quote was created.
  - To change the Date, **type** in or click on the down **arrow** to select the date using the calendar function.
  - To change the Time, **type** in or use the directional **arrows** to select the time.



Sa	e Back App	Equipment / Location by Sales Apply Premplate Apply Premplate Methodo	oject Delete	Si	Finance / HR Inventory Ma ave Layout Format Print	aintenance / Projects	Manufad	ct.	uring Procuremen	nt Sales	Service	Reporting	UEE	- 8	
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		Parts	2020-998	Stap	ple Unit	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	245.0	00
		Parts	SP19-147K	Blac	k Toner SP1919	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	143.0	00
		Parts	SP19-147M	Mag	jenta toner - SP1919	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	500.0	00
		Parts	SP2020	SP2	020 Sprint Colour Multi Function	Main Warehouse	1.00	00	0.000	ea	0.000	0.000	0.000	5,400.0	00
		Parts	2020-147K	Blac	k toner SP2020	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	500.0	00
		Parts	2020-147M	Mag	enta toner SP2020	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	500.0	00
		Parts	2020-147C	Суа	n toner SP2020	Main Warehouse	1.00	0	0.000		0.000	0.000	0.000	500.0	00
		Parts	2020-147L	SP2	020 Clear Toner	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	500.0	00
		Parts	2020-856	Dru	m	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	500.0	00
		Parts	2020-147Y	Yello	ow toner SP2020	Main Warehouse	1.00	00	0.000		0.000	0.000	0.000	500.0	00
			TON003	Mult	ti-funtional Copier Bundle - SP2020		0.00	00	0.000		0.000	0.000	0.000	0.0	00
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#### **FINANCIAL HEADING**

- **Currency:** The currency would have defaulted to the currency used by the customer when the quote was created. To change the currency, click on the down **arrow** to choose a different currency from the list.
- **Tax Rate:** The tax rate would have defaulted to the tax rate set up for the customer when the quote was created. This field cannot be edited.
- Exchange Rate: The exchange rate will display the exchange rate that was set up in the system for the customer when the quote was created. Type in or use the directional **arrows** to modify the exchange rate for the quote.



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		Parts	2020-998	Stap	le Unit	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	245.000
		Parts	SP19-147K	Blac	k Toner SP1919	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	143.000
		Parts	SP19-147M	Mag	enta toner - SP1919	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
		Parts	SP2020	SP2	020 Sprint Colour Multi Function	Main Warehouse	1	.000	0.00	0 ea	0.000	0.000	0.000	5,400.000
		Parts	2020-147K	Blac	k toner SP2020	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
		Parts	2020-147M	Mag	enta toner SP2020	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
		Parts	2020-147C	Cya	n toner SP2020	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
		Parts	2020-147L	SP2	020 Clear Toner	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
		Parts	2020-856	Dru	n	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
		Parts	2020-147Y	Yello	w toner SP2020	Main Warehouse	1	.000	0.00	0	0.000	0.000	0.000	500.000
			TON003	Mult	i-funtional Copier Bundle - SP2020		C	.000	0.00	0	0.000	0.000	0.000	0.000
		Select type												

### **CROSS REFERENCE INFORMATION**

- 1. From the cross reference grid you can link reference types to the quote.
- 2. The Reference Number column will display any Reference Types that have already been linked.



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	Parts	2020-998	Stap	le Unit		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	245.000
	Parts	SP19-147K	Black	Toner SP1919		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	143.000
	Parts	SP19-147M	Mage	enta toner - SP1919		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
	Parts	SP2020	SP20	20 Sprint Colour Mult	ti Function	Main Warehouse		1.000	0	.000 ea		0.000	0.000	0.000	5,400.000
	Parts	2020-147K	Black	toner SP2020		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
	Parts	2020-147M	Mage	enta toner SP2020		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
	Parts	2020-147C	Cyan	toner SP2020		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
	Parts	2020-147L	SP20	20 Clear Toner		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
	Parts	2020-856	Drum	1		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
			Velley	w toner SP2020		Main Warehouse		1.000	0	.000		0.000	0.000	0.000	500.000
	Parts	2020-147Y	Tello	1 101101 01 2020								0.000	0.000		
	Parts	2020-147Y TON003		-funtional Copier Bun	ndle - SP2020			0.000	0	.000		0.000	0.000	0.000	0.000

## Change or Link a Reference

- 3. Click in the **Reference Number** field of the reference you wish to add or change, to display the **ellipsis** button.
- 4. Click on the ellipsis button to display the Select the related [] for the quote screen.
- 5. Click on the **row** of the reference you wish to link to the quote.
- 6. Click on OK.



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		Parts	2020-147C	Cyan toner SP20	20	CNO	000002	N	lachine ser	vice			С		D	0.000	500.000
		Parts	2020-147L	SP2020 Clear To	ner	CN0	000003	S	ervice requ	ired			С		D	0.000	500.000
		Parts	2020-856	Drum	_/	CNO	000006	F	epair staple	e unit (no	on stock item in	voiced/credited)	С			0.000	500.000
		Parts	2020-147Y	Yellow toner SP2		CNO	000007	E	lack toner r	equired	(stock grn, sup	plier return, dn)	С			0.000	500.000
			TON003	Multi-funtional C	ópier B	CNO	000010	T	oner requir	ed			С		D	0.000	0.000
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								Ŧ				Grand	TOTAL				10,681.20

## **QUOTE ITEM DATA GRID**

## **Apply Sales Template**

- When you click on **Quotes - Apply Sales Template**, the quote will populate with the **Items** specified on the template you select.

- The template items will be appended to Quote Items that have already been added to the quote.

 You can add to, or remove items, as required, after which you can then adjust the quantities and selling price(s).



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## **Apply Project Methodology**

When you **Quotes - Apply Project Methodology** Project Methodology is applied to a quote, the system will generate sub projects and work orders as set up in the methodology layers (once the quote has been converted into a New Deal Project).

If there are resource requirements specified, then these resources will be requested.

One, or multiple methodologies can be applied to a quote.

You can apply a Project Methodology and a Sales Template to the same sales quote.



#### **DELETE QUOTE ITEM**

- 1. Click on the **row** of the quote item you wish to delete.
- 2. Click Delete Item.
- 3. When you receive the **Confirm delete line** message to confirm;

# • Are you sure you want to remove this line from the quote?

4. Click on Yes.

\$	Ŧ				Edit Customer Q	uote - QTOO	000294 - <b>BPC</b>	): Versio	n 2.4.0.1	1	Example Comp	any				_ 0	
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### **ADD QUOTE ITEM**

- 5. Click anywhere in the Item line grid or press **Tab** at the end of the previous quote item to open a new item line.
- Make the necessary changes to the Quantity, Discount and Unit Selling Price by clicking in the text box and type or use the directional arrows to enter the correct amounts.



Click here for information on how to "Add Quote Item" on page 7(s) to the Quote.

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		Bianca Du Toit	a Ciai		Date & Time	27/05/2020	▼ 05:31:14	-		ASMN S	erial No				
		South African Ran	d	•	Exchange Rate			• \$ 0		CALL C	all Reference				
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										PMNG Pr	roject Referer	nce			
	SuppressOnPrint	QuoteItemType	ItemCode	-	teItemDescription		WarehouseName	Quantity		QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice
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		Parts	2020-147K		k toner SP2020		Main Warehouse	1.00		0.00		415.91		0.000	415.92
		Parts	SP2020		20 Sprint Colour Multi	Function	Main Warehouse	1.00		0.00		2,816.66			12,345.00
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ļ		Travel Select type	100	Trav	el not exceeding 100 k	km		₹1.00	0	0.00	0	0.00	0 0.000	7 0.000	7 350.00
		New Item Line													
4	Comment											Sub Total	-		13.371.39
	Comment										2	Sub Total	-		13,371.39

#### **EDIT COMMENTS**

 Click in the Comments text box to add a comment or to make changes to an existing comment. The comment will display on the **quote document**.

## **SAVE QUOTE**

8. When you have finished making the required changes, click **Save**.



Comment         Sub Total         Sub Total         13,046           Comment         Sub Total         1,355         1,355	•	+ Home	Equipment / Locati	ons Contrac	ct	Edit Customer Qu Finance / HR Inve	-							Service	Reporting	L®I	- 8	
Save Layout Project Methodogy Trem       Save Layout Print         Customer Hame       Hope Works (Pty) Ltd <ul> <li>Reference:</li> <li>Add02</li> <li>Status</li> <li>New Quate</li> <li>No</li> <li>Call</li> <li>Call Call Reference</li> <li>Ca</li></ul>				×		2												
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Contact Name         Type Class Commercial         Type Class Commercial         Type Class Commercial         Type Class Commercial         WCOR         Work Order Reference         Quote         WCOR         Work Order Reference         Quote	c	ustomer Name	Hope Works (Ptv)	Ltd	٩	* Reference	AB02			•		RefType R	leferenceType	F	ReferenceNo			
Commercial         Type Class Commercial              • Date & Time             27/05/2020             05:31:14             •             • Echange Rate             1.00             •             • Echange Rate             1.00             •             •										- <b>*</b>	۲	WKOR V	Vork Order Rei	ference				*
Salesman       Bianca Du Tott <ul> <li>Currency</li> <li>South African Rand</li> <li>I.00</li> <li>South African Rand</li> <li>I.00</li> <li>South African Rand</li> <li>I.00</li> <li>Project Reference</li> <li>CRT</li> <li>Contract No</li> <li>Project Reference</li> <li>Project Reference</li> <li>Parts</li> <li>O2020-147K</li> <li>Black toner SP2020</li> <li>Main Warehouse</li> <li>I.00</li> <li>O.000</li> <li>VarehouseName</li> <li>I.000</li> <li>I.000</li> <li>O.000</li> <li>I.000</li> <li>O.000</li> <li>O.000<th></th><th></th><th>Type Class Comme</th><th>ercial</th><th>•</th><th></th><th>-</th><th>▼ 05:3</th><th>31:14</th><th>1</th><th></th><th>QUOT S</th><th>ales Quote</th><th></th><th></th><th></th><th></th><th></th></li></ul>			Type Class Comme	ercial	•		-	▼ 05:3	31:14	1		QUOT S	ales Quote					
Currency         South African Rand         Exchange Rate         1.00         CTRT         Contract No           SuppressOnPrint         QuoteItem/ype         Item/Cole         QuoteItem/Description         WarehouseName         Quantity         QuantityPe/UOP         UnitType         UnitTyp					•					•								
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## 9. You will return to the Sales Quotes listing screen.

A	dd Edit D	elete View	Forward Accepted	Rejected Convert Order	Clone Ouote			out Worksp	Durb Naces New		Refresh			
	Maintain		Navigati "	Process	Quote	Print	. F	ormat	4	Current				<
	QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	
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	QT0000275	BOT0001	Bothas Networking inc	test	2,715.00	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A	
	QT0000276	BOT0001	Bothas Networking inc	test	4,377.75	USD	10.00	0.00	30/07/2019	Bianca Du Toit		N	A	
	QT0000277	APP0001	Apple Juice Inc	Test Quote	6,509.54	ZAR	1.00	15.00	21/08/2019	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	
	QT0000280	BIL0001	Billys Barn	7896	0.00	ZAR	1.00	15.00	24/01/2020	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	
	QT0000292	BIG0001	Big Bargains	AB01_SalesStudio	241,500.00	ZAR	1.00	15.00	27/05/2020	Abigail Milne		Ν	A	
	QT0000293	HOP001	Hope Works (Pty) Ltd	AB01_CloneQu	15,377.10	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A	
۲	QT0000294	HOP001	Hope Works (Pty) Ltd	AB02	15,003.35	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	A	
	QT0000295	APP0001	Apple Juice Inc	123789_CloneQ	17,500.47	ZAR	1.00	15.00	27/05/2020	Bianca Du Toit		N	Α	
	QT0000296	HOP001	Hope Works (Pty) Ltd	AB012	15,855.41	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned	N	A	
	QT0000297	HOP001	Hope Works (Pty) Ltd	AB13	15,825.45	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned quote	N	A	
	QT0000298	HOP001	Hope Works (Pty) Ltd	AB014	15,392.35	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned,	N	A	
	QT0000299	HOP001	Hope Works (Pty) Ltd	AB016	15,662.06	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Quote cloned,	N	A	
	QT0000300	HOP001	Hope Works (Pty) Ltd	AB017	259,864.04	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned a quot	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	
	QT0000302	HOP001	Hope Works (Pty) Ltd	Test Marc 02	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A	
	QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test M	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		N	A	
	QT0000306	SWE0001	Sweets	Test Default Ite	2,794.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A	
	QT0000309	HOT0001	Hot Pink	Test Matt02	2,150.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	Α	
	QT0000310	DER001	Derton / Technologies	Test Matt03	299.54	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	A	

Help v2024.5.0.7/1.0 - Pg 11 - Printed: 04/07/2024

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#### **VIEW QUOTE IN CRM**

The updated quote will pull through to **CRM** where it can be viewed.

#### **Related Topics**

- Apply a Sales Template
- Apply a Project Methodology
- Print Sales Quote
- View Quote in CRM

MNU.062.007