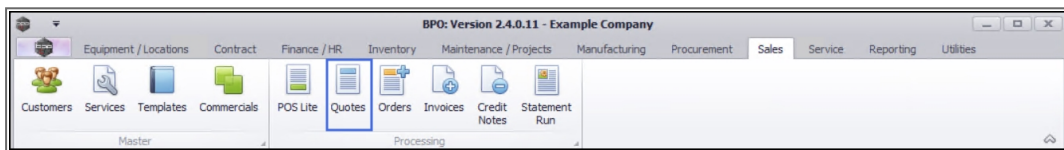


We are currently updating our site; thank you for your patience.

SALES

QUOTES - ACCEPTED

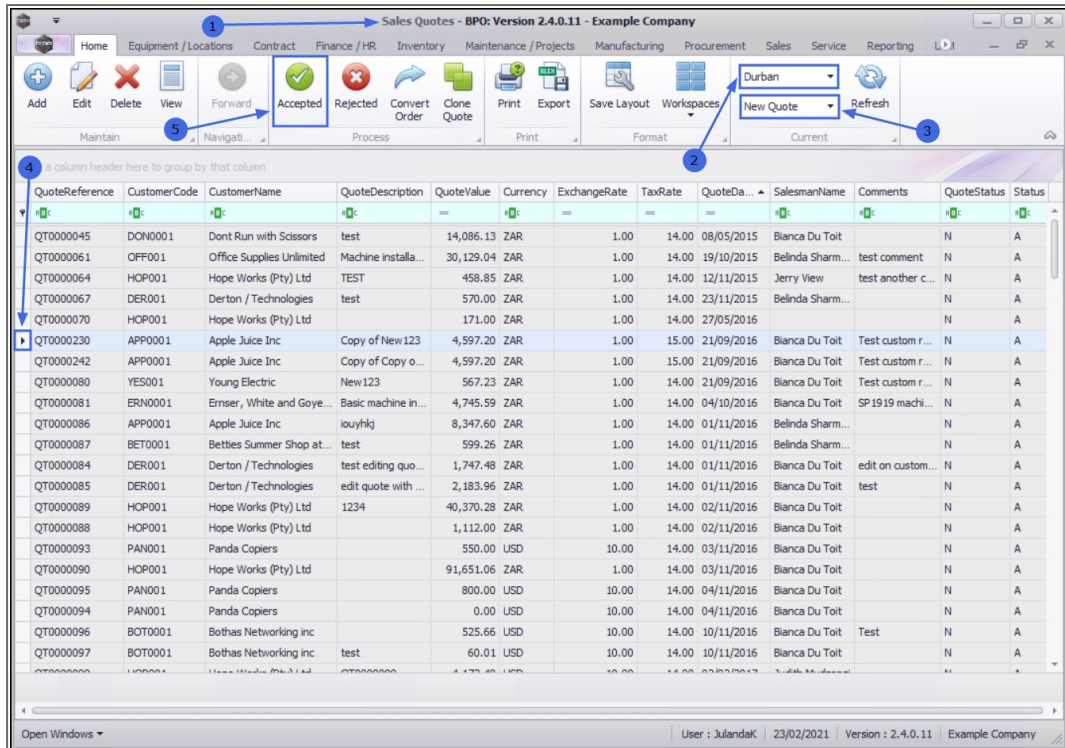
Ribbon Access: Sales > Quotes



1. The **Sales Quotes** listing screen will display.
2. Select the **Site** where the quote was created.
 - The example has **Durban** selected.
3. Sales Quotes can only be **Accepted** in the New Quote status.
 - Ensure the **Status** is set to **New Quote**.
4. Click on the **row** of the Quote you wish to convert to accepted.
5. Click on **Accepted**.



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

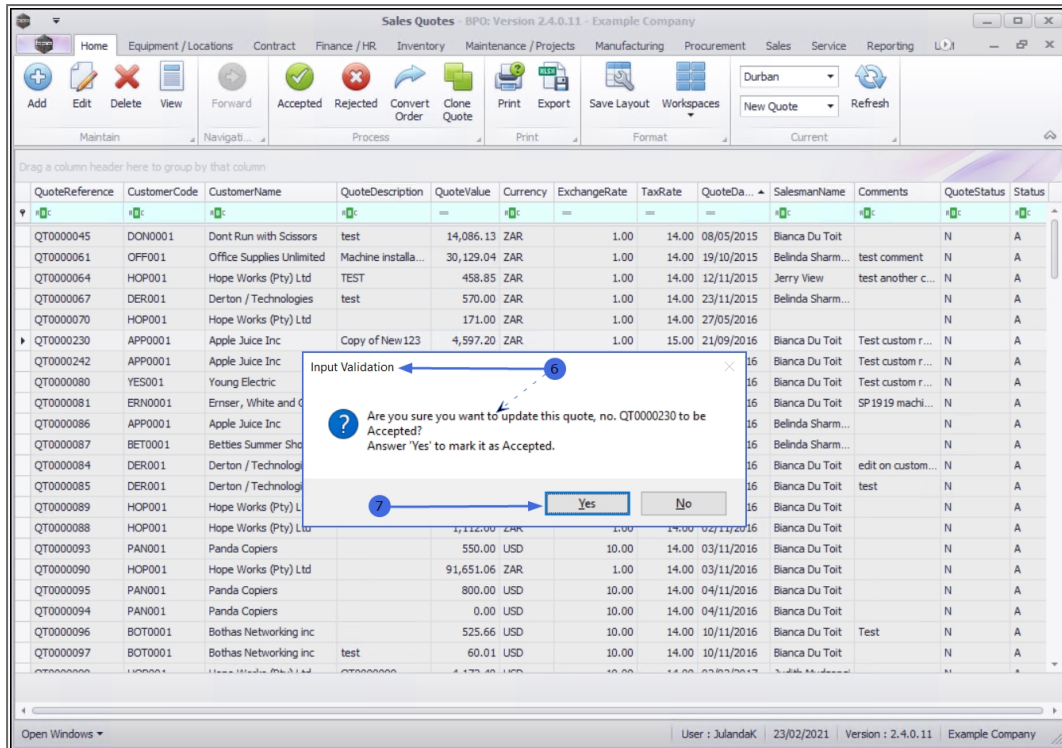


6. When you receive the **Input Validation** message to confirm;

- **Are you sure you want to update this quote, no. QT [quote number] to be Accepted? Answer 'Yes' to mark it as Accepted.**

7. Click on **Yes**, if you are certain about your selection.

- Clicking on **No** will ignore the request and to leave the Quote in the New Quote status.



VIEW QUOTE IN ACCEPTED STATUS

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



Note that the quote that has been Accepted will no longer be available in the **New Quote** Status list.

2. Change the **Status** by clicking on the drop-down **arrow** to display the Status drop-down list.
3. Click on **Customer Accepted Quote**.

The screenshot displays the 'Sales Quotes' application interface. At the top, there is a navigation bar with various menu items like 'Home', 'Equipment / Locations', 'Contract', 'Finance / HR', 'Inventory', 'Maintenance / Projects', 'Manufacturing', 'Procurement', 'Sales', 'Service', and 'Reporting'. Below this is a toolbar with icons for 'Add', 'Edit', 'Delete', 'View', 'Forward', 'Accepted', 'Rejected', 'Convert Order', 'Clone Quote', 'Print', and 'Export'. A dropdown menu is open, showing options for 'Status' and 'StatusDesc'. The 'Status' dropdown is set to 'Accepted'. A 'Refresh' button is visible next to the dropdown. The main area shows a table of sales quotes with columns for 'QuoteReference', 'CustomerCode', 'CustomerName', 'QuoteDescription', 'QuoteValue', 'Currency', 'ExchangeRate', 'TaxRate', and 'QuoteDate'. The table contains several rows of data, including quotes for 'Dont Run with Scissors', 'Hope Works (Pty) Ltd', 'Cash Sales Account', 'Derton / Technologies', 'Healing Hands', and 'Office Supplies Unlimited'. The status of all quotes in the table is 'A'.

4. The **Sales Quotes** listing screen will be filtered using the **Customer Accepted** Status selection.

PROCESS ACTION BUTTONS

5. From this screen you can choose to;

- [Reject](#) the Quote,
- [Convert to Order](#),
- [Clone Quote](#), or
- [Print a Quote](#)

Sales Quotes - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Add Edit Delete View Forward Accepted Rejected Convert Clone Print Export Save Layout Workspaces

Durban Customer Ac... Refresh

Rejected Convert Order Clone Quote Print

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	Quote	SalesmanName	Comments	QuoteStatus	Status
QT0000046	DON0001	Dont Run with Scissors	test	Bianca Du Toit	test	A	A
QT0000069	HOP001	Hope Works (Pty) Ltd	OR585	Bianca Du Toit		A	A
QT0000209	HOP001	Hope Works (Pty) Ltd	test	Bianca Du Toit	test	A	A
QT0000132	HOP001	Hope Works (Pty) Ltd	Call - Labour	Bianca Du Toit		A	A
QT0000072	CU5001	Cash Sales Account		Bianca Du Toit		A	A
QT0000078	BIG0001	Big Bargains	test	Bianca Du Toit	test	A	A
QT0000055	HOP001	Hope Works (Pty) Ltd	test	Belinda Sharm...		A	A
QT0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 Fr...	Abigail Mine		A	A
QT0000198	APP0001	Apple Juice Inc	test	Bianca Du Toit		A	A
QT0000141	HOP001	Hope Works (Pty) Ltd	Quotes - WO	Bianca Du Toit		A	A
QT0000227	HEA0001	Healing Hands	test	Bianca Du Toit		A	A
QT0000104	HOP001	Hope Works (Pty) Ltd	stdm	Judith Mudzengi		A	A
QT0000288	OFF001	Office Supplies Unlimited		Sne Ndwalane	test email	A	A
QT0000065	HOP001	Hope Works (Pty) Ltd	test	Bianca Du Toit	test	A	A
QT0000073	HOP001	Hope Works (Pty) Ltd	test	Bianca Du Toit		A	A
QT0000254	HOP001	Hope Works (Pty) Ltd	1234	Bianca Du Toit		A	A
QT0000071	DER001	Derton / Technologies	9876	Bianca Du Toit		A	A
QT0000077	BET0001	Bettes Summer Shop at...		Bianca Du Toit		A	A
QT0000074	BIG0001	Big Bargains	1234	Bianca Du Toit	1234	A	A
QT0000131	HOP001	Hope Works (Pty) Ltd	Quote - Calls	Bianca Du Toit		A	A

Open Windows User: JulandaK 22/09/2021 Version: 2.5.0.4 Example Company v2.5.0.0

MNU.062.009

