

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

SALES

QUOTES - APPLY PROJECT METHODOLOGY

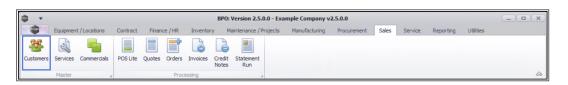
When a Project Methodology is applied to a quote, the system will generate **sub projects** and **work orders** as set up in the **methodology layers**, once the quote has been converted into a New Deal Project.

If **resource requirements** were specified, then these will be requested.

A single- or multiple methodologies can be applied to a quote.

Both Methodologies and Sales Templates can be applied to the same sales quote.

Ribbon Access: Maintenance / Projects > Projects



- 1. The Sales Quotes Listing screen will be displayed.
- 2. Select the **Site** where the quote can be located.
 - The example has **Durban** selected.
- 3. Ensure that the **Status** has been set to **New Quote**.
- 4. Click on the **row** of the quote you wish to apply a Methodology to.
- 5. Click on **Edit**.

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



Quotes - Apply Project Methodology

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QT0000064	HOP001	Hope Works (Pty) Ltd	TEST	458.85	ZAR	1.00	14.00	12/11/2015	Jerry View	test another c	N	A	
QT0000067	DER001	Derton / Technologies	test	570.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm		N	A	
QT0000070	HOP001	Hope Works (Pty) Ltd		171.00	ZAR	1.00	14.00	27/05/2016			N	A	
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QT000085	DER001	Derton / Technologies	edit quote with	2,183.96	ZAR	1.00	14.00	01/11/2016	Bianca Du Toit	test	N	Α	
QT0000086	APP0001	Apple Juice Inc	iouyhkj	8,347.60	ZAR	1.00	14.00	01/11/2016	Belinda Sharm		N	A	
QT0000087	BET0001	Betties Summer Shop at	test	599.26	ZAR	1.00	14.00	01/11/2016	Belinda Sharm		N	A	
QT000088	HOP001	Hope Works (Pty) Ltd		1,112.00	ZAR	1.00	14.00	02/11/2016	Bianca Du Toit		N	Α	
QT0000089	HOP001	Hope Works (Pty) Ltd	1234	40,370.28	ZAR	1.00		02/11/2016	Bianca Du Toit		N	Α	
QT0000090	HOP001	Hope Works (Pty) Ltd		91,651.06	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		N	Α	
QT0000093	PAN001	Panda Copiers		550.00		10.00		03/11/2016	Bianca Du Toit		N	A	
QT0000094	PAN001	Panda Copiers		0.00		10.00		04/11/2016	Bianca Du Toit		N	A	
QT0000095	PAN001	Panda Copiers		800.00		10.00		04/11/2016	Bianca Du Toit	-	N	A	
QT0000096	BOT0001	Bothas Networking inc		525.66		10.00		10/11/2016	Bianca Du Toit	Test	N	A	
QT0000097	BOT0001	Bothas Networking inc	test	60.01		10.00		10/11/2016	Bianca Du Toit		N	A	
QT0000099	HOP001	Hope Works (Pty) Ltd	QT0000099	4,172.40		10.00		02/02/2017	Judith Mudzengi		N	A	
QT0000100	BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A	

- 7. The Edit Customer Quote QT[quote number] will be displayed.
- 8. Click on the **Methodologies** tab to view any project methodologies that have already been linked.
- 9. Click on Apply Project Methodology.

Help v2024.5.0.7/1.0 - Pg 2 - Printed: 04/07/2024



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- 10. The **Select the methodology to apply** screen will display.
- 11. Click on the **row** of the Project Methodology you wish to apply to the quote.
- 12. Click on OK.



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- The Quote will be updated and the tasks defined by the methodology will be appended to any existing quote items that have already been created.
- 14. The **Methodologies frame** has also been updated with the Methodology information selected.
- 15. You may now proceed to edit Quote Item(s) or "Delete Quote Item" on page 9(s) as required.
- When done editing the Quote, click on Save to return to the Sales Quotes listing screen.



Quotes - Apply Project Methodology

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		Parts	2020-147M	Magenta toner SP2020	Main Warehouse	1.000						
		Parts	2020-147C	Cyan toner SP2020	Main Warehouse	1.000						
	13	Parts	2020-147Y	Yellow toner SP2020	Main Warehouse	1.000						
		Parts	SP2020	SP2020 Sprint Colour MF Copier	Main Warehouse	0.000						
		Parts	2020-147K	Black toner SP2020	Main Warehouse	1.000						
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Help v2024.5.0.7/1.0 - Pg 5 - Printed: 04/07/2024

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