

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

SALES

QUOTES – APPLY PROJECT METHODOLOGY

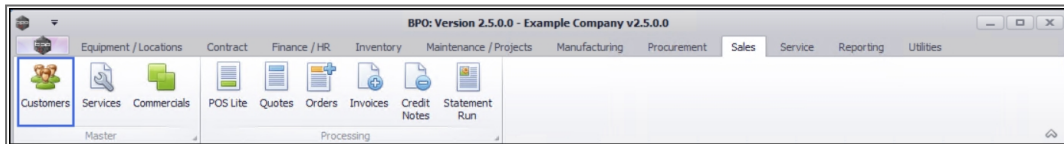
When a Project Methodology is applied to a quote, the system will generate **sub projects** and **work orders** as set up in the **methodology layers**, once the quote has been converted into a New Deal Project.

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.

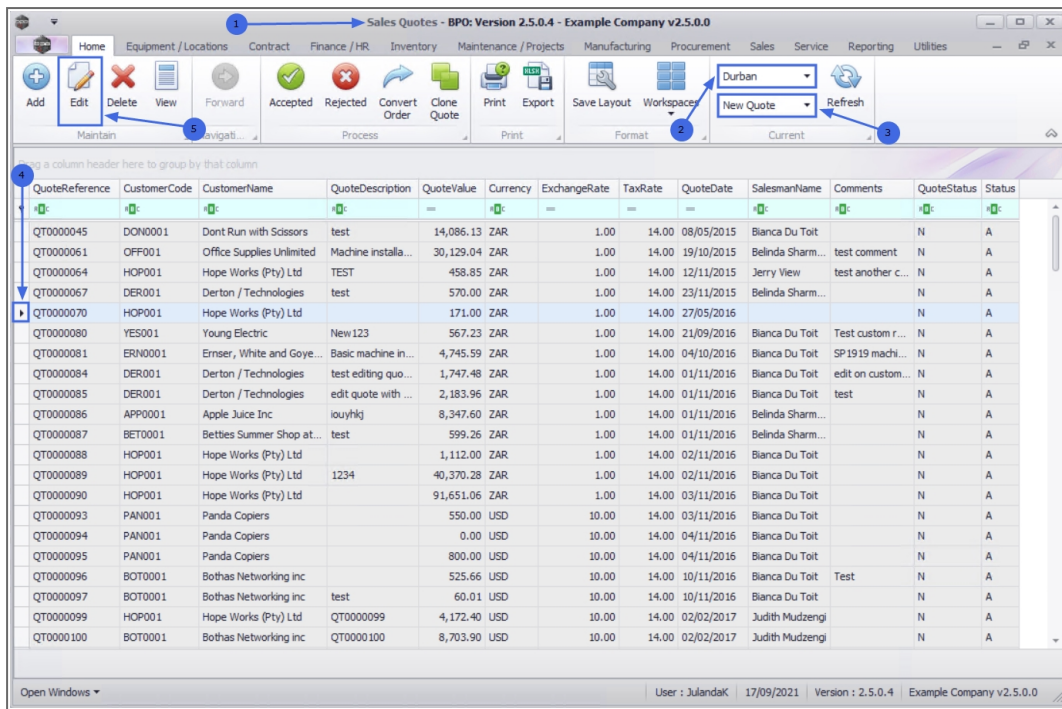
Ribbon Access: Maintenance / Projects > Projects



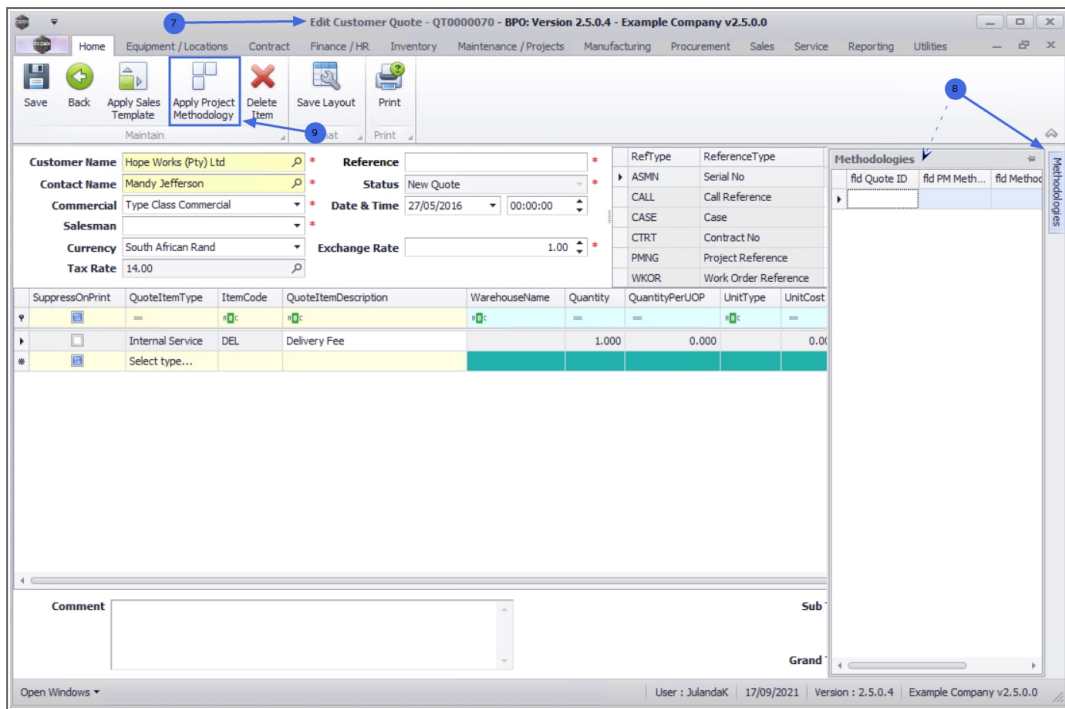
1. The **Sales Quotes** Listing screen will be displayed.
2. Select the **Site** where the quote can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **New Quote**.
4. Click on the **row** of the quote you wish to apply a Methodology to.
5. Click on **Edit**.



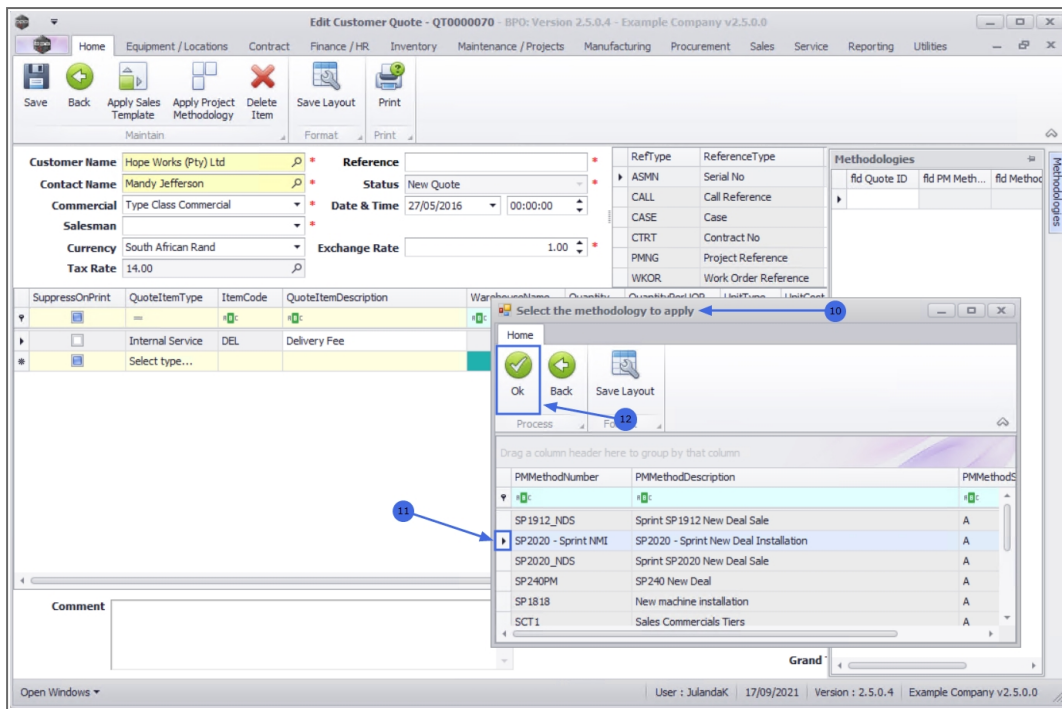
Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.



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**.



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**.



13. 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.
16. When done editing the Quote, click on **Save** to return to the Sales Quotes listing screen.

MNU.062.010

