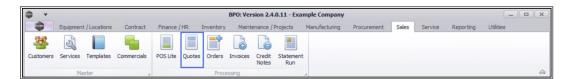


We are currently updating our site; thank you for your patience.

# **SALES**

## **QUOTES - VIEW SALES QUOTE**

Ribbon Access: Sales > Quotes



- 1. The Sales Quotes listing screen will display.
- 2. Select the **Site** the quote was created for.
  - The example has **Durban** selected.
- 3. Select the Status for the Sales Quote you wish to view.

Note that a Sales Quote can be viewed in <u>any</u> Status.

- The example has **New Quote** selected.
- 4. Click on the **row** of the quote you wish to view.
- 5. Click on View.



## Quotes - View Sales Quote

-	dd Edit De	lete View	Forward Accepted	Rejected Convert Order	Clone Quote			out Worksp	aces New	an • Quote •	Refresh		
4		here to group by		1100000	4			Grinde	2	Garrent		//	
	QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDa 🔺	SalesmanName	Comments	QuoteStatus	Statu
2	RBC	8 <b>8</b> C	8 C	8 <b>0</b> 0	-	RBC	-	=	-	8 8 C	88C	R C	REC
1	QT0000164	BIT001	Bits and Bytes	1234	628.27	ZAR	1.00	1.00	07/08/2017	Bianca Du Toit		N	Α
	QT0000162	BIT001	Bits and Bytes	test	5,130.00	ZAR	1.00	1.00	07/08/2017	Bianca Du Toit		N	A
	QT0000159	OFF001	Office Supplies Unlimited	test	2,077.19	ZAR	1.00	14.00	07/08/2017	Bianca Du Toit		N	Α
1	QT0000169	BOT0001	Bothas Networking inc	test	66.12	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	Α
1	QT0000172	BOT0001	Bothas Networking inc	USD zero vat ex	51.75	USD	10.00	0.00	08/08/2017	Bianca Du Toit		N	Α
1	QT0000173	HOP001	Hope Works (Pty) Ltd	BPO ZAR 14 1	5,402.59	ZAR	1.00	1.00	08/08/2017	Bianca Du Toit		N	Α
7	QT0000171	HOP001	Hope Works (Pty) Ltd	test	786.60	ZAR	1.00	1.00	08/08/2017	Bianca Du Toit		N	Α
	QT0000174	HOP001	Hope Works (Pty) Ltd	BPO Quote deta	513.00	ZAR	1.00	1.00	08/08/2017	Bianca Du Toit		N	Α
1	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
1	QT0000181	HOP001	Hope Works (Pty) Ltd	TEST	427.50	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit	test	N	Α
1	QT0000178	PAN001	Panda Copiers	USD, 1, 10, ITEM	270.04	USD	10.00	1.00	10/08/2017	Bianca Du Toit		N	Α
4	QT0000184	OFF001	Office Supplies Unlimited	bpo2 credit not	196.65	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit		N	Α
1	QT0000176	OFF001	Office Supplies Unlimited	ZAR 14 TYPE M	1,686.76	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit	ZAR 14 TYPE	N	Α
1	QT0000179	SAM001	Samanthas Diner	USD, 0, 15, TYP	48.59	USD	10.00	0.00	10/08/2017	Bianca Du Toit		N	Α
1	QT0000182	HOP001	Hope Works (Pty) Ltd	zero selling	2,583.37	ZAR	1.00	1.00	10/08/2017	Bianca Du Toit		N	Α
1	QT0000177	BOT0001	Bothas Networking inc	USD, 14, 10, IT	2,832.42	USD	10.00	0.00	10/08/2017	Bianca Du Toit	USD, 14, 10, I	N	Α
1	QT0000180	SAM001	Samanthas Diner	USD, 0, 10, TYPE	171.54	USD	10.00	0.00	10/08/2017	Bianca Du Toit		N	Α
1	QT0000192	SAM001	Samanthas Diner	test	376.06	USD	11.00	0.00	15/08/2017	Bianca Du Toit	test	N	Α
1	QT0000189	OFF001	Office Supplies Unlimited	test	5,553.93	ZAR	1.00	14.00	15/08/2017	Bianca Du Toit	test	N	Α
1	QT0000190	BOT0001	Bothas Networking inc		533.63	USD	10.00	0.00	15/08/2017	Bianca Du Toit		N	Α
1	QT0000191	PAN001	Panda Copiers		526.54	USD	10.00	14.00	15/08/2017	Bianca Du Toit		N	A
1	070000102	CA14001	C		200 57	LICD	10.00	0.00	10 100 100 17	Diana D. Talk		NI.	

## 6. The View Customer Quote - QT[quote number] screen will display.

#### The Customer Quote contains:

- 7. The Customer Details frame,
- 8. The Related References frame,
- 9. The Quote Items frame,
- 10. The Methodologies tab and
- 11. The Comments field.



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C	ustomer Name	Hope Works (Pty) Ltd			* Reference	BPO Quote o	e detail tax rate check		*	RefType	ReferenceType	2	ReferenceNo		
Contact Name Commercial		Mandy Jefferson Type Class Commercial Bianca Du Toit			* Status	New Quote			- *	ASMN	CALL Call Reference				
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### **VIEW METHODOLOGIES**

- 1. Click on the **Methodologies** tab, to expand the frame.
- 2. Any methodologies linked to the quote will be listed.
- 3. Clicking anywhere outside the Methodologies frame will **hide the frame**.
- 4. To keep the frame from closing, **pin the frame** to the screen by clicking on the pin button. Clicking on the pin again, will allow you to close the frame once again.



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Customer Name	Hope Works (Pty)	Ltd	*	Reference	test quote	with more	than 20 cha	r *		f Method	dologies					+	3
Contact Name	Mandy Jefferson		*	Status	New Quote			* *	<ul> <li>AS</li> </ul>		uote ID	fld PM N	1ethod ID	fld Method No	fld Metho	od Desc	Methodologies
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4				Click here to hide the Methodologies frame if it has not been pinned													
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#### **Related Topics**

• Print a Sales Quote

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