

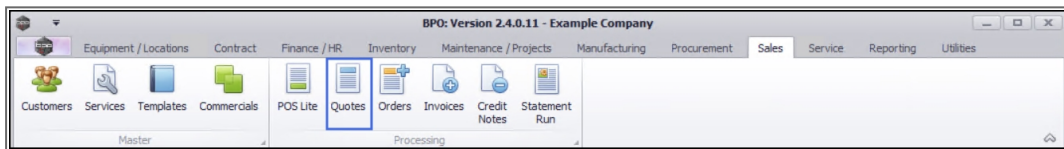
We are currently updating our site; thank you for your patience.

SALES

QUOTES – REJECTED

A Sales Quote can be **Rejected** when the quote is in the **New Quote** or **Customer Accepted Quote** Status.

Ribbon Access: Sales > Quotes



1. The Sales Quotes listing screen will be displayed
2. Ensure that the correct **Site** has been selected.
 - The example has **Durban** selected.
3. Select the **Status** for the Sales Quote that needs to be rejected.
 - The example has the **Customer Accepted quote** status selected.
4. Click on the **row** of the quote you wish to **reject**.
5. Click on **Rejected**.



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

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000046	DON0001	Dont Run with Scissors	test	19,726.54	ZAR	1.00	14.00	08/05/2015	Bianca Du Toit	test	A	A
QT0000055	HOP001	Hope Works (Pty) Ltd	test	4,503.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm...		A	A
QT0000065	HOP001	Hope Works (Pty) Ltd	test	549.12	ZAR	1.00	14.00	12/11/2015	Bianca Du Toit	test	A	A
QT0000069	HOP001	Hope Works (Pty) Ltd	OR589	20,978.85	ZAR	1.00	14.00	18/04/2016	Bianca Du Toit		A	A
QT0000072	CUS001	Cash Sales Account		481.60	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	A
QT0000071	DER001	Derton / Technologies	9876	88,263.56	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	A
QT0000073	HOP001	Hope Works (Pty) Ltd	test	285.00	ZAR	1.00	14.00	09/06/2016	Bianca Du Toit		A	A
QT0000074	BIG0001	Big Bargains	1234	570.00	ZAR	1.00	14.00	08/08/2016	Bianca Du Toit	1234	A	A
QT0000077	BET0001	Betties Summer Shop at...		581.96	ZAR	1.00	14.00	01/09/2016	Bianca Du Toit		A	A
QT0000078	BIG0001	Big Bargains	test	481.60	ZAR	1.00	14.00	05/09/2016	Bianca Du Toit	test	A	A
QT0000104	HOP001	Hope Works (Pty) Ltd	stdm	114.00	ZAR	1.00	14.00	17/02/2017	Judith Mudzengi		A	A
QT0000132	HOP001	Hope Works (Pty) Ltd	Call - Labour	392.16	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	A
QT0000141	HOP001	Hope Works (Pty) Ltd	Quotes - WO	493.62	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	A
QT0000131	HOP001	Hope Works (Pty) Ltd	Quote - Calls	10,936.02	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		A	A
QT0000198	APP0001	Apple Juice Inc	test	4,254.48	ZAR	1.00	14.00	06/11/2017	Bianca Du Toit		A	A
QT0000209	HOP001	Hope Works (Pty) Ltd	test	600.36	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit	test	A	A
QT0000227	HEA0001	Healing Hands	test	0.00	ZAR	1.00	15.00	22/06/2018	Bianca Du Toit		A	A
QT0000254	HOP001	Hope Works (Pty) Ltd	1234	9,489.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		A	A
QT0000288	OFF001	Office Supplies Unlimited		14,317.50	ZAR	1.00	15.00	17/04/2020	Sne Ndwalande	test email	A	A
QT0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 Fr...	3,450.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		A	A

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

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

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

- Clicking on **No** will ignore the request and leave the quote in either New Quote or Customer Accepted status.

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDa...	SalesmanName	Comments	QuoteStatus	Status
QT0000046	DON0001	Dont Run with Scissors	test	19,726.54	ZAR	1.00	14.00	08/05/2015	Bianca Du Toit	test	A	A
QT0000055	HOP001	Hope Works (Pty) Ltd	test	4,503.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm...		A	A
QT0000065	HOP001	Hope Works (Pty) Ltd	test	549.12	ZAR	1.00	14.00	12/11/2015	Bianca Du Toit	test	A	A
QT0000069	HOP001	Hope Works (Pty) Ltd	OR589	20,978.85	ZAR	1.00	14.00	18/04/2016	Bianca Du Toit		A	A
QT0000072	CUS001	Cash Sales Account		481.60	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	A
QT0000071	DER001	Derton / Technologies	9876	88,263.56	ZAR	1.00	14.00	02/06/2016	Bianca Du Toit		A	A
QT0000073	HOP001	Hope Works (Pty) Ltd							Bianca Du Toit		A	A
QT0000074	BIG0001	Big Bargains							Bianca Du Toit	1234	A	A
QT0000077	BET0001	Betties Summer Shop							Bianca Du Toit		A	A
QT0000078	BIG0001	Big Bargains							Bianca Du Toit	test	A	A
QT0000104	HOP001	Hope Works (Pty) Ltd							Bianca Du Toit		A	A
QT0000132	HOP001	Hope Works (Pty) Ltd							Bianca Du Toit		A	A
QT0000141	HOP001	Hope Works (Pty) Ltd							Bianca Du Toit		A	A
QT0000131	HOP001	Hope Works (Pty) Ltd							Bianca Du Toit		A	A
QT0000198	APP0001	Apple Juice Inc	test	4,234.40	ZAR	1.00	14.00	08/11/2017	Bianca Du Toit		A	A
QT0000209	HOP001	Hope Works (Pty) Ltd	test	600.36	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit	test	A	A
QT0000227	HEA0001	Healing Hands		0.00	ZAR	1.00	15.00	22/06/2018	Bianca Du Toit		A	A
QT0000254	HOP001	Hope Works (Pty) Ltd	1234	9,489.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		A	A
QT0000288	OFF001	Office Supplies Unlimited		14,317.50	ZAR	1.00	15.00	17/04/2020	Sne Ndwalane	test email	A	A
QT0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 Fr...	3,450.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		A	A

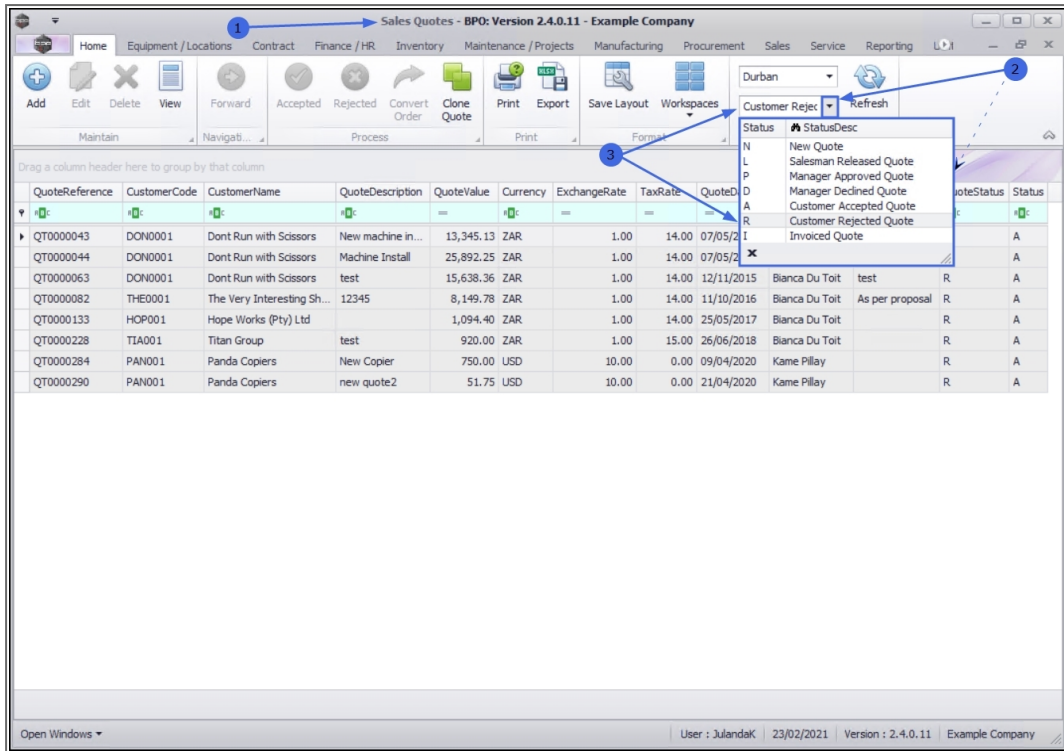
VIEW QUOTE IN REJECTED STATUS

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



Note that the quote that has been Rejected will no longer be available under the **New Quote** or the **Customer Accepted** 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 Rejected Quote**.



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;

- [Clone a 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 Order Clone Print Export Save Layout Workspaces

Durban Customer Rej... Refresh

Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status	
QT0000284	PAN001	Panda Copiers	New Copier	0.00	09/04/2020	Kame Pillay		R	A	
QT0000063	DON0001	Dont Run with Scissors	test	14.00	12/11/2015	Bianca Du Toit	test	R	A	
QT0000043	DON0001	Dont Run with Scissors	New machine in...	13,345.13	14.00	07/05/2015	Bianca Du Toit	Colour machin...	R	A
QT0000044	DON0001	Dont Run with Scissors	Machine Install	25,892.25	14.00	07/05/2015	Bianca Du Toit	New installation	R	A
QT0000133	HOP001	Hope Works (Pty) Ltd		1,094.40	14.00	25/05/2017	Bianca Du Toit		R	A
QT0000290	PAN001	Panda Copiers	new quote2	51.75	0.00	21/04/2020	Kame Pillay		R	A
QT0000228	TIA001	Titan Group	test	920.00	15.00	26/06/2018	Bianca Du Toit		R	A
QT0000082	THE0001	The Very Interesting Sh...	12345	8,149.78	14.00	11/10/2016	Bianca Du Toit	As per proposal	R	A

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

MNU.062.012

