

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

SALES STUDIO CONFIGURATION

ADD QUOTE DEFAULT ITEMS

Default items are items that are set up to be added to all new quotes.

These are items that a company requires to be quoted **every single time**, and therefore need to be linked automatically, so that the salesman does not need to remember to add them. For example, a company may require a consultation fee and a site inspection fee to be included in every sales quote.

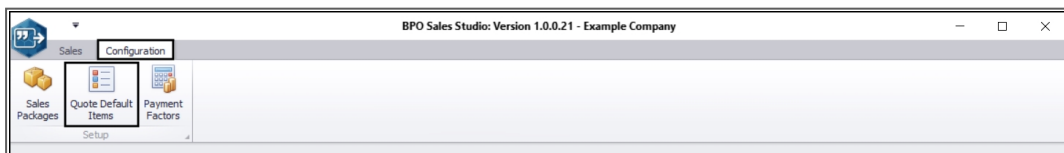
Although these items pull through to each new quote, each item can be individually **removed** from each quote or **edited**, if required.

Follow the process below to **add** quote default items.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Configuration > Quote Default Items

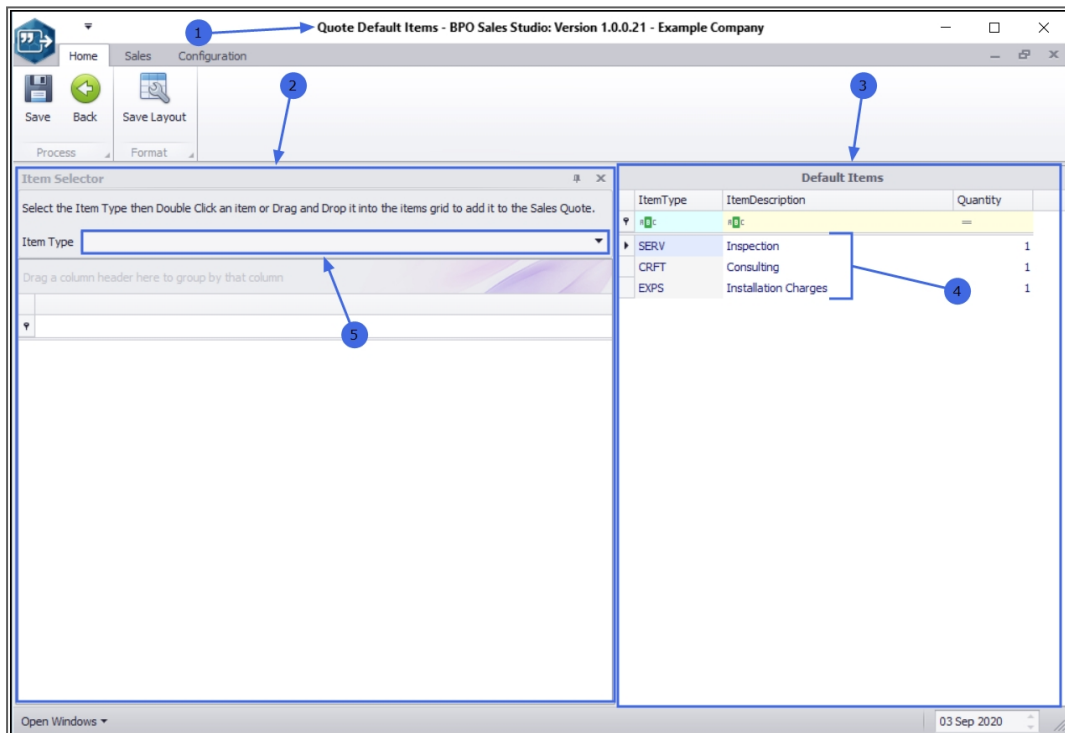


THE QUOTE DEFAULT ITEMS SCREEN

1. The **Quote Default Items** screen will open.
2. The **Item Selector** frame is on the left of the screen. This is where you are able to choose individual items to be added to the
3. **Default Items** frame, on the right of the screen. This frame, contains items that have already been linked and will appear on each new Sales Quote.
4. In this example, an **Inspection** fee, a **Consulting** fee and an **Installation Charges** fee have already been set up to link to each new quote.

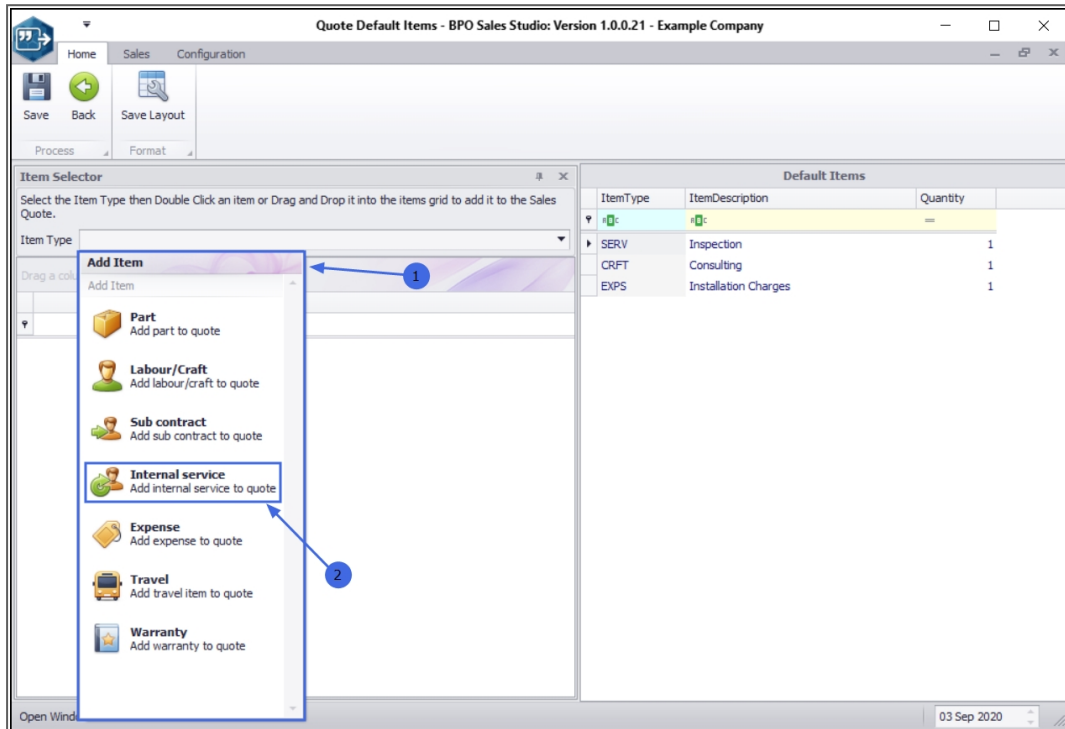
SELECT THE ITEM TYPE

5. In the Item Selector frame, click anywhere in the **Item Type** field.



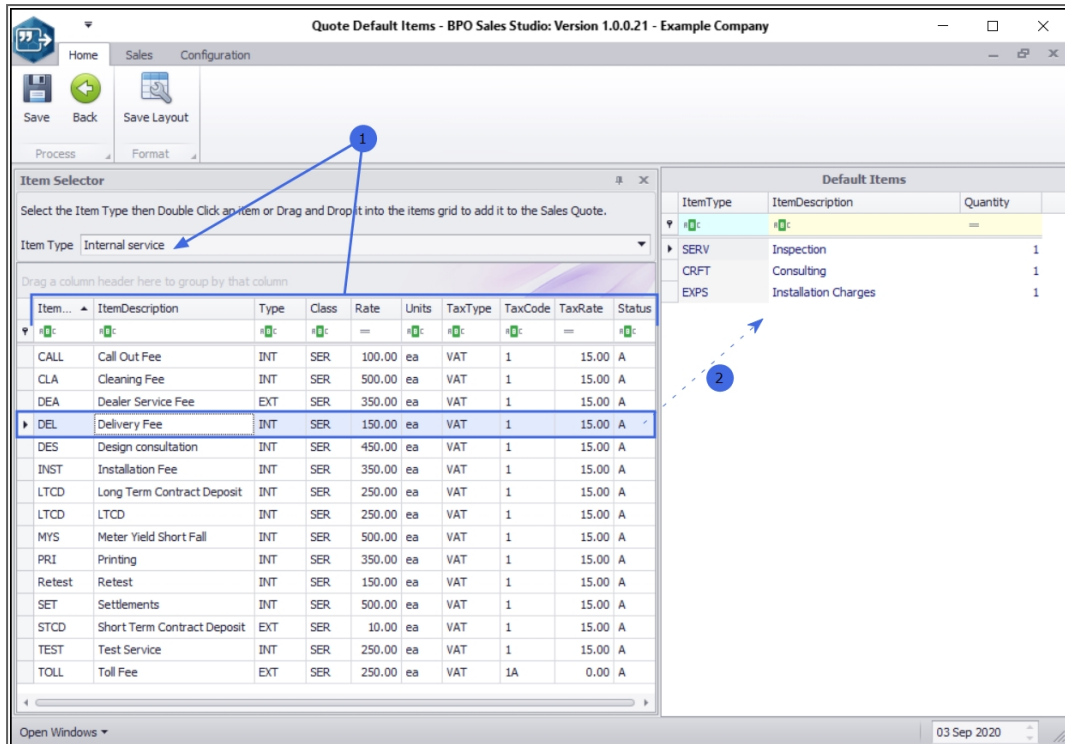
SELECT ITEM TYPE

1. The **Add Item** menu will pop up.
2. Select from the list, the required **Item Type**.
 - In this example, **Internal Service** is selected.



SELECT ITEM TO ADD TO THE QUOTE

1. The **Item Selector** frame will populate with a data grid of all the items linked to the selected **Item Type**.
2. Select the required item and either,
 - i. **Double click** in the item row or,
 - ii. **Drag and drop** the selected item into the **Default Items** frame.
 - In this example, **Delivery Fee** is selected.

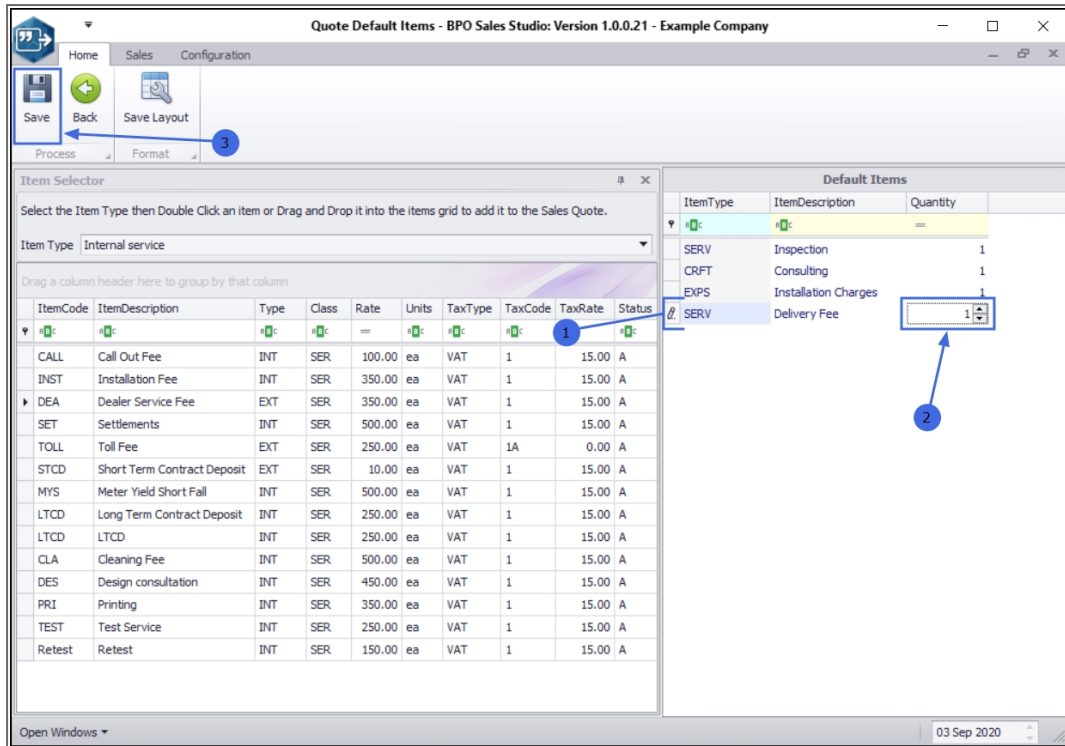


ADJUST ITEM QUANTITY

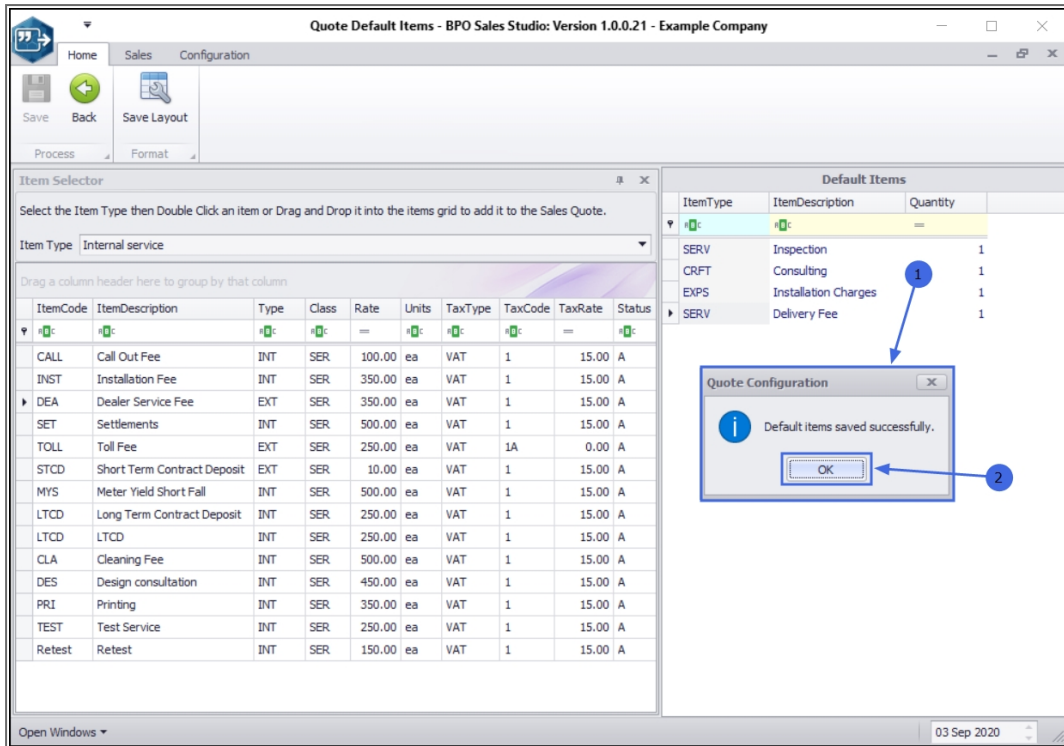
1. You will see the selected item is now added to the data grid in the **Default Items** frame.
2. Click in the **Quantity** column to display directional arrows. You can either,
 - i. **Type in** or
 - ii. Use the directional **arrows** to select an alternative quantity, if required.

SAVE ADDED DEFAULT ITEMS

3. When you have added all the required items to the Default Items frame, click on **Save**.

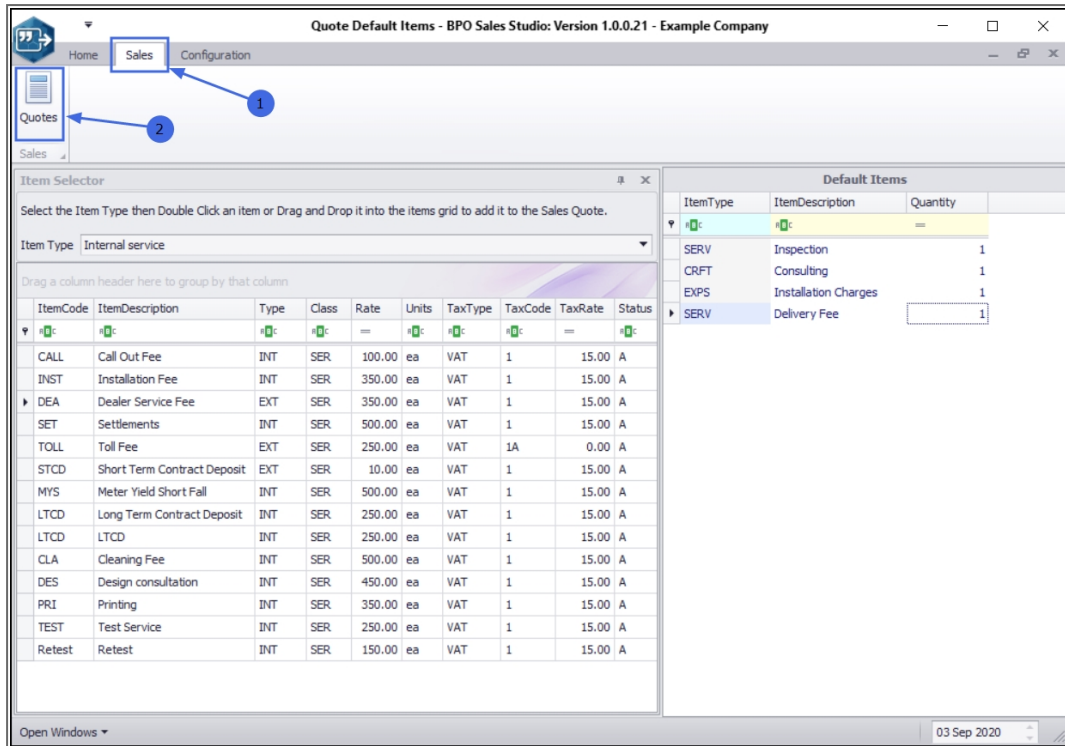


1. A **Quote Configuration** message box will pop up informing you;
 - **Default items saved successfully.**
2. Click on **OK**.

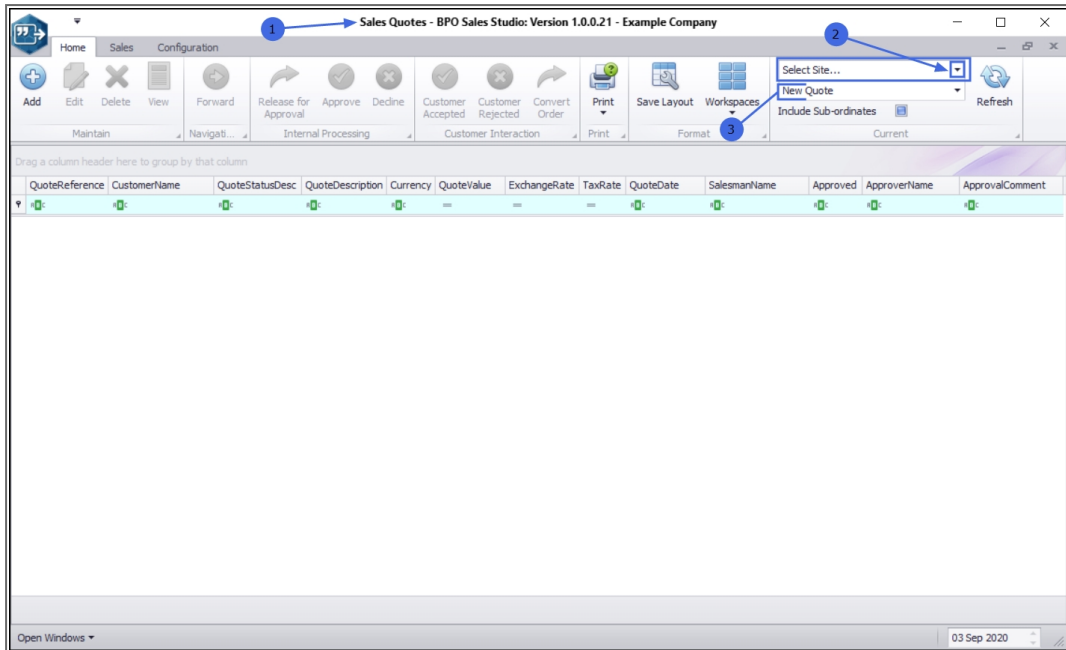


VIEW ADDED DEFAULT ITEM ON A SALES QUOTE

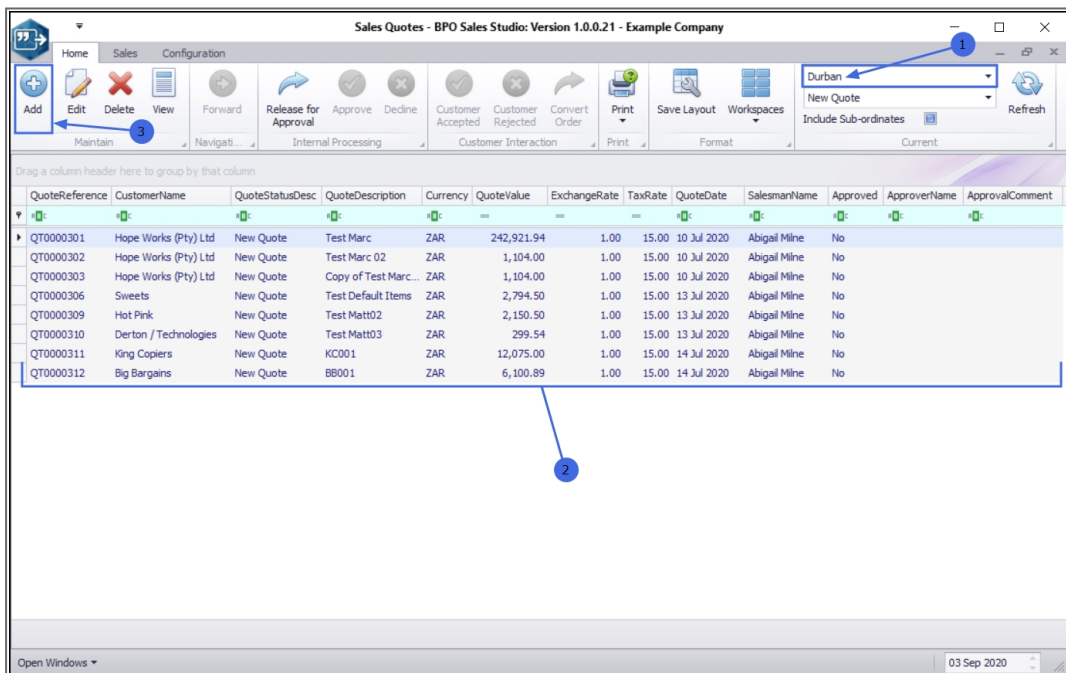
1. Click on the **Sales** ribbon tab.
2. The screen will refresh to display the **Quotes** toolbar button, click on this button.



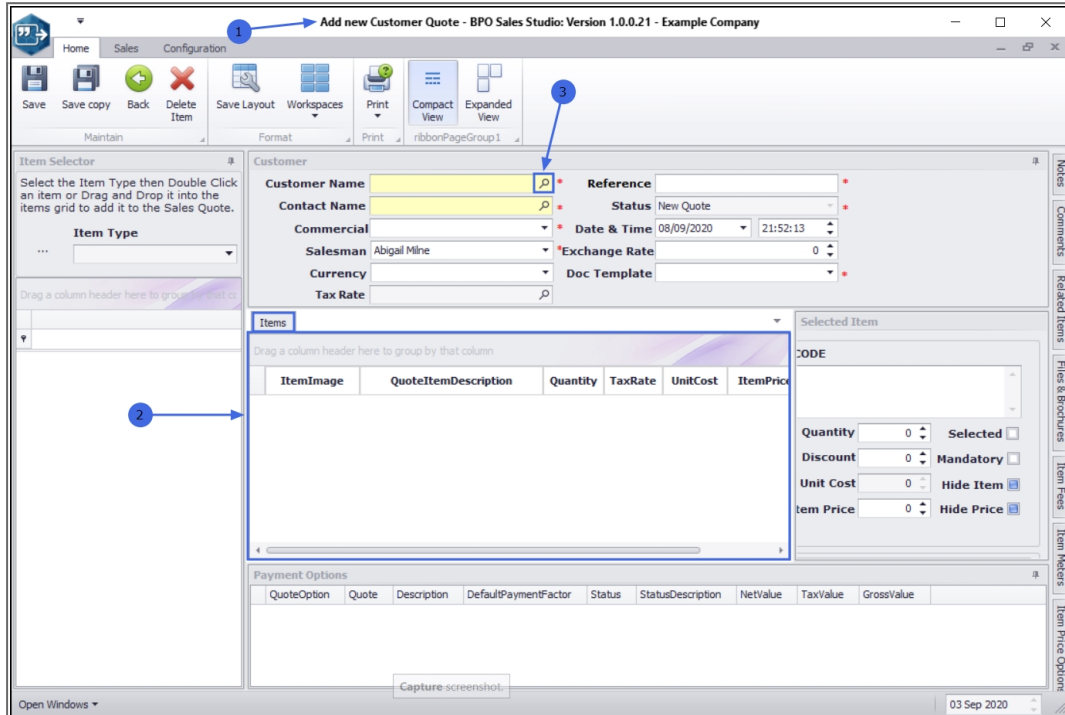
1. The **Sales Quotes** listing screen will open.
2. Click on the drop-down arrow in the **Site** field and select from the list, the applicable site.
3. Upon opening this screen, the **Status** field auto populates with '**New Quote**'. You can click on the drop-down **arrow** in this field and select an alternative status from the list that will appear. For the purpose of this manual, the status will remain as **New Quote**.



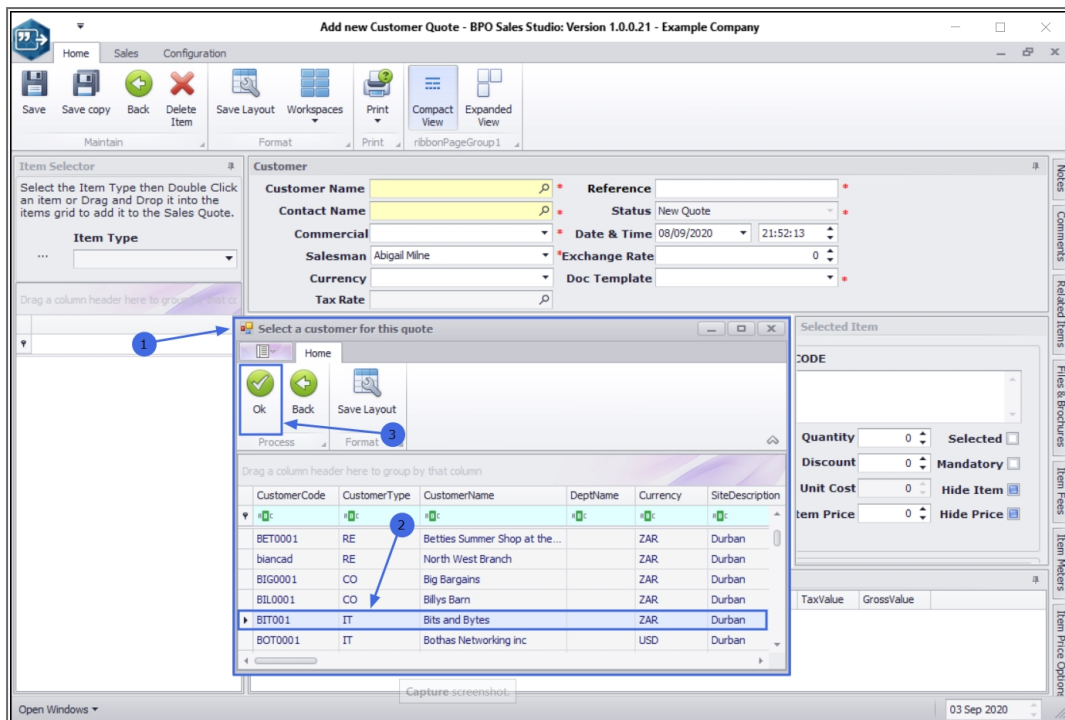
1. Once you have selected the site,
2. the data grid will populate with all the **New Quotes** linked to that specific site.
3. Click on **Add**.



1. The **Add new Customer Quote** screen will open.
2. You will note that the **Items** frame does not yet contain any item details.
3. A customer needs to be selected before the default items will populate this frame. Click on the **search** icon in the **Customer Name** field.



1. The **'Select a customer for this quote'** screen will pop up.
2. Select the **row** of the customer that you wish to view.
3. Click on **Ok**.



1. As the selected customer details populate the **Customer** frame,
2. the **Items** frame will populate with all the Default Quote Items as listed in the Quote Default Items screen.
3. You will note that the recently added default item (image 5) also appears here.
4. Click on **Back** or **Close** (without saving any changes) to **exit** the 'Edit Customer Quote' screen and then **Close** the 'Sales Quotes' listing screen, to return to the **Quote Default Items** screen.

Customer

Customer Name: Bits and Bytes * Reference: *
 Contact Name: * Status: New Quote
 Commercial: Default * Date & Time: 08/09/2020 21:52:13
 Salesman: Abigail Milne * Exchange Rate: 1
 Currency: South African Rand * Doc Template: *
 Tax Rate: 15.00 *

ItemImage	QuoteItemDescription	Quantity	TaxRate	UnitCost	Item Price
No image data	Consulting	1,000	15,000	550,000	434.00
No image data	Installation Charges	1,000	15,000	0,000	
No image data	Inspection	1,000	15,000	800,000	
No image data	Delivery Fee	1,000	15,000	800,000	

Selected Item

CON
 Consulting
 Quantity: 1 Selected
 Discount: 0 Mandatory
 Unit Cost: 550.0000 Hide Item
 Item Price: 434.00 Hide Price

QuoteOption	Quote	Description	DefaultPaymentFactor	Status	StatusDescription	NetValue	TaxValue	GrossValue

MNU.166.002

