

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

SALES STUDIO CONFIGURATION

DELETE 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.

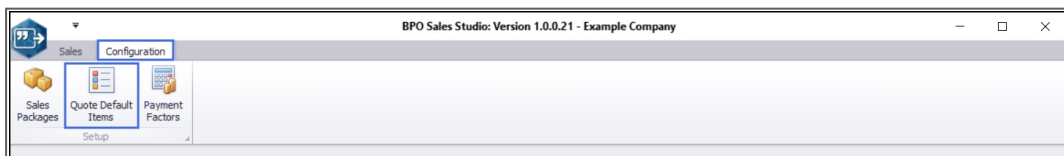
Although these items pull through to each new quote, each item can be individually **removed** from each quote or **edited**, if required.

Follow the process below to **delete a** quote default item.

Version Compatibility

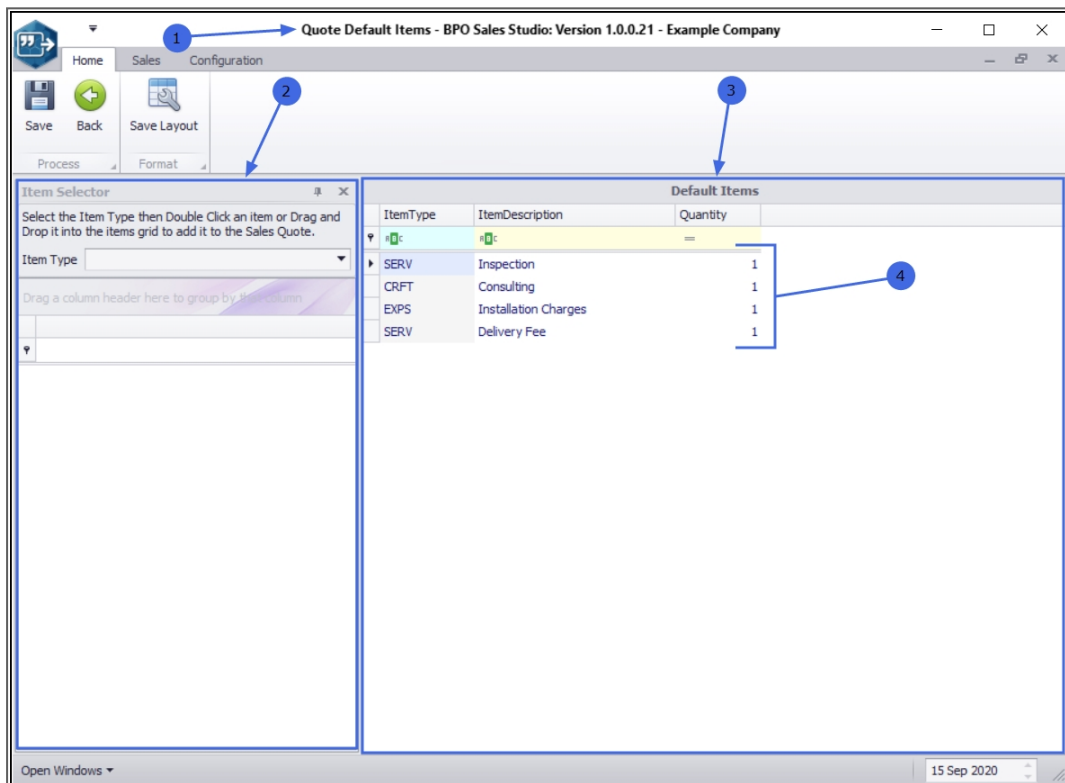
- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Configuration > Quote Default Items



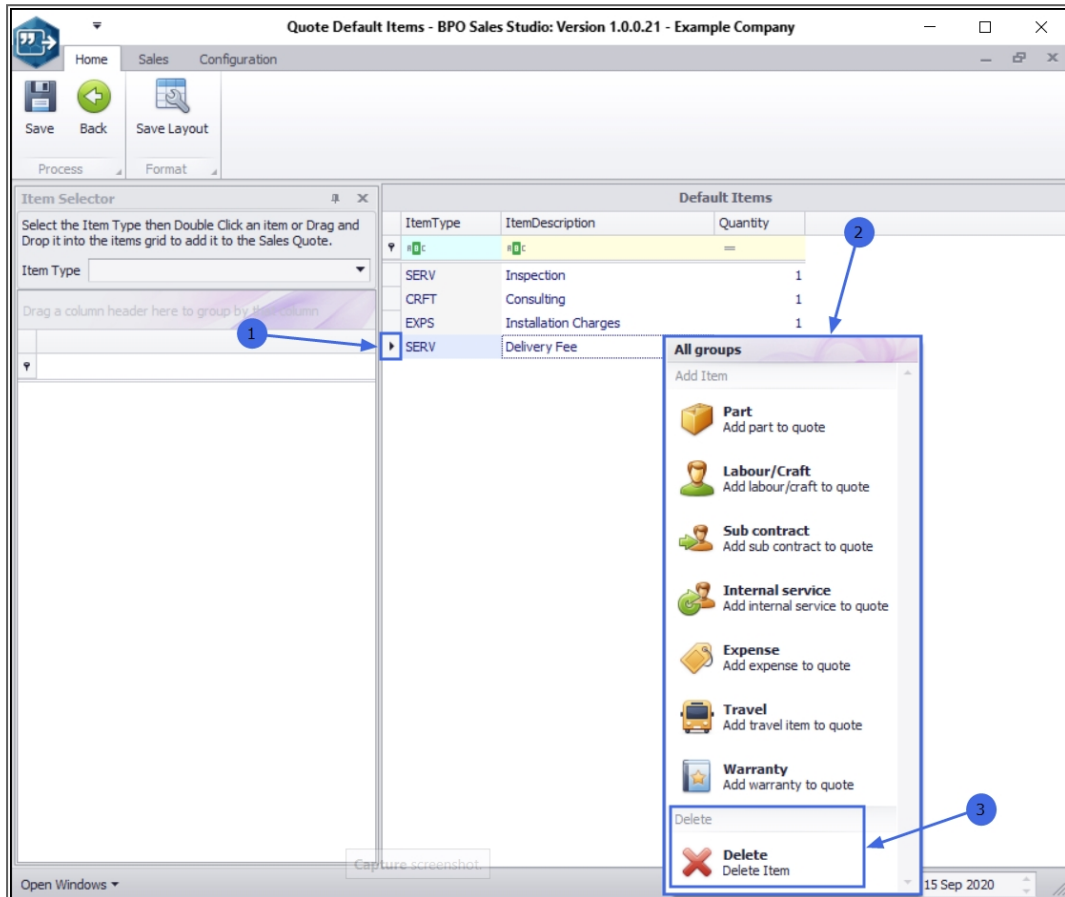
THE 'QUOTE DEFAULT ITEMS' SCREEN

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, an **Installation Charges** fee and a **Delivery Fee** have been set up to link to each new quote.

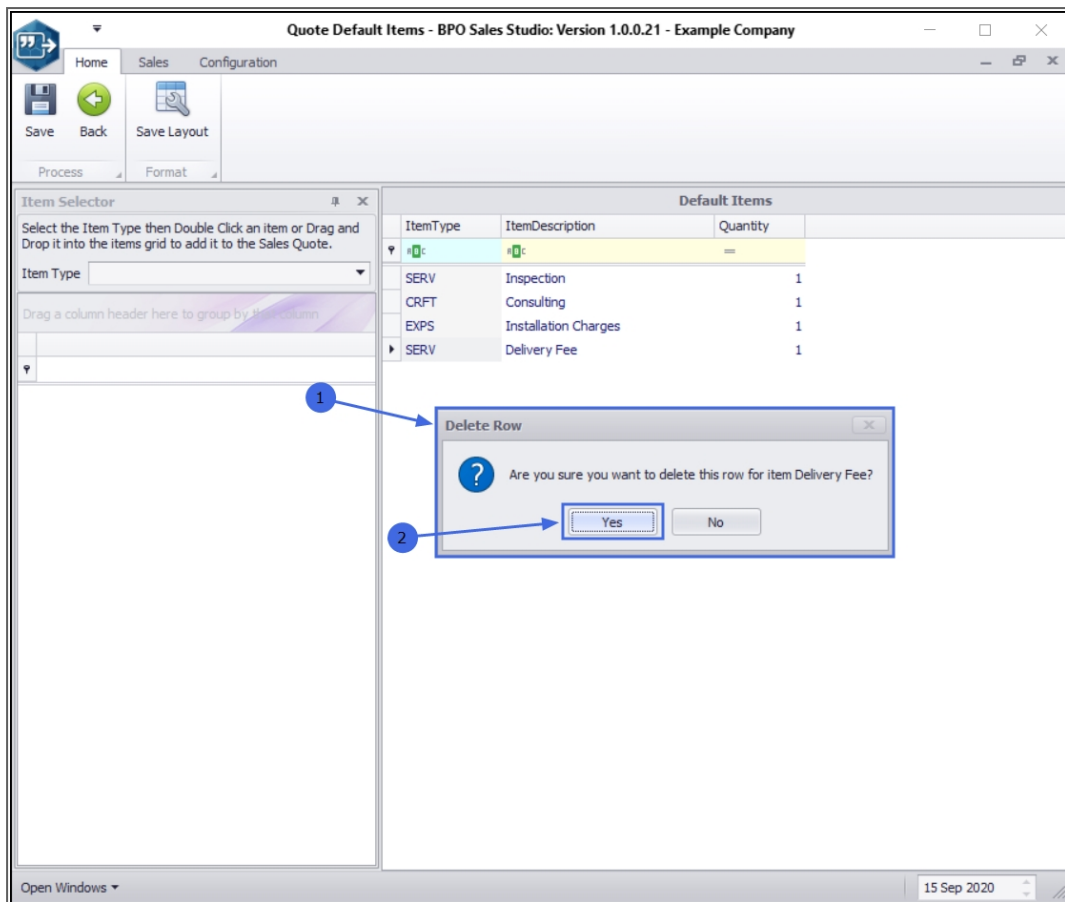


SELECT ITEM TO BE DELETED

1. **Right click** in the **row** of the item that you wish to delete.
2. An **All Groups** menu will pop up.
3. Select **Delete** - Delete Item from this menu.

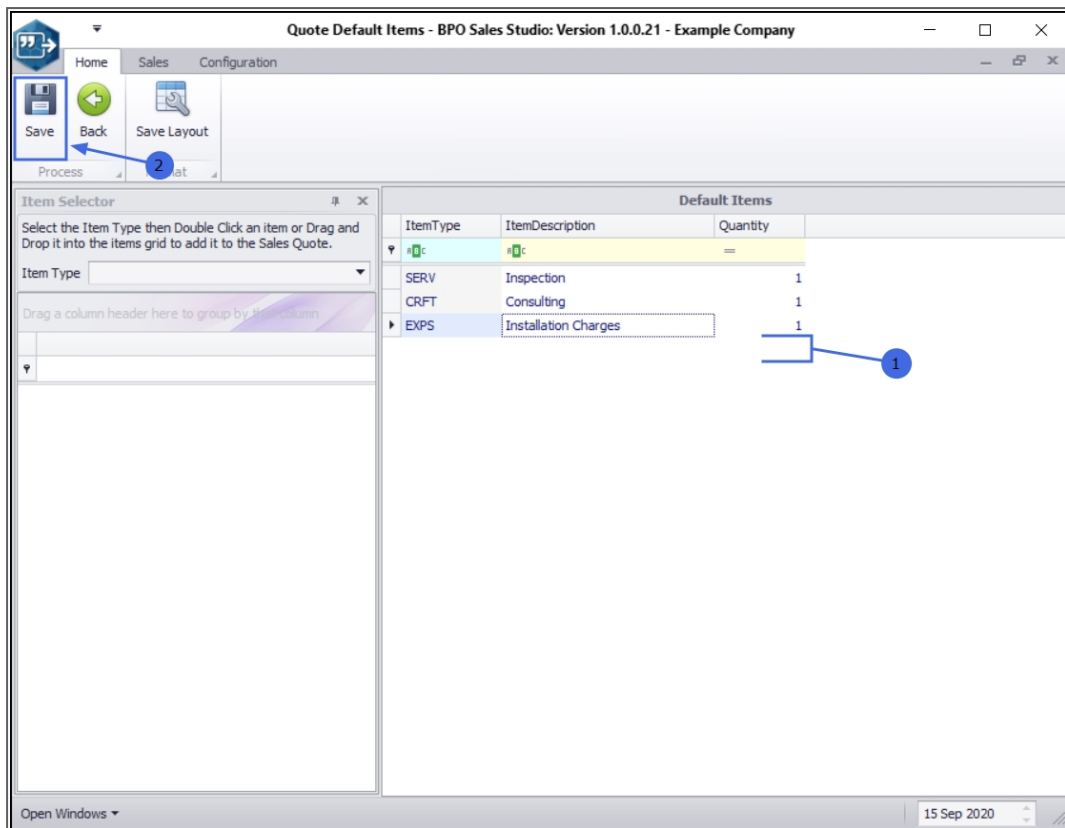


1. A **Delete Row** message box will pop up asking;
 - **Are you sure you want to delete this row for item [Delivery Fee]?**
2. Click on **Yes**.

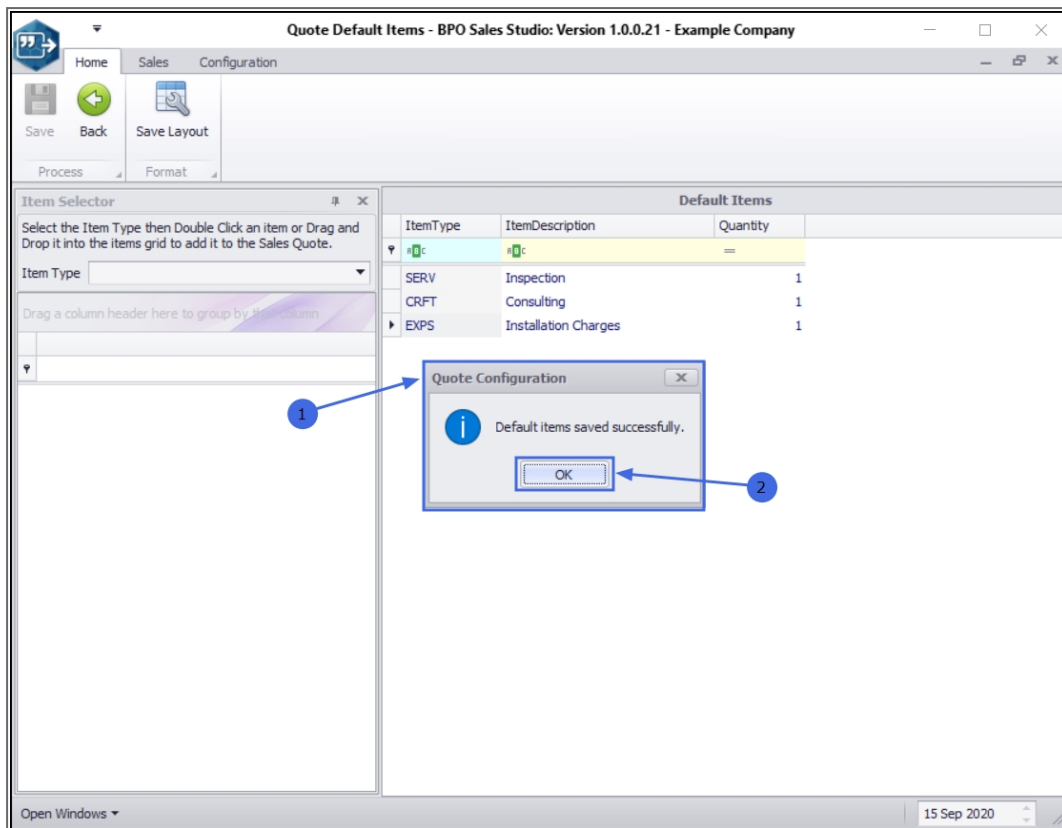


SAVE CHANGES

1. The screen will **refresh** and the selected item will be **removed** from the Default Items frame.
2. Click on **Save**.



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



You can repeat the process to delete more items, if required.

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