

## 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.

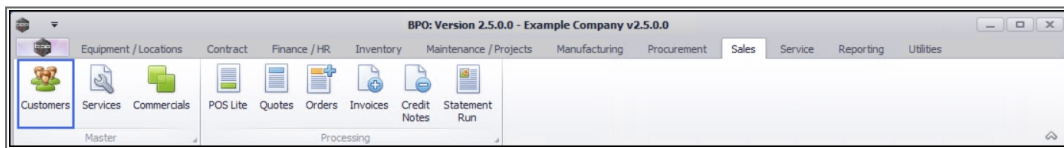
A single- or multiple methodologies can be applied to a quote.

Both Methodologies and Sales Templates can be applied to the same sales quote.

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**Ribbon Access:** *Maintenance / Projects > Projects*

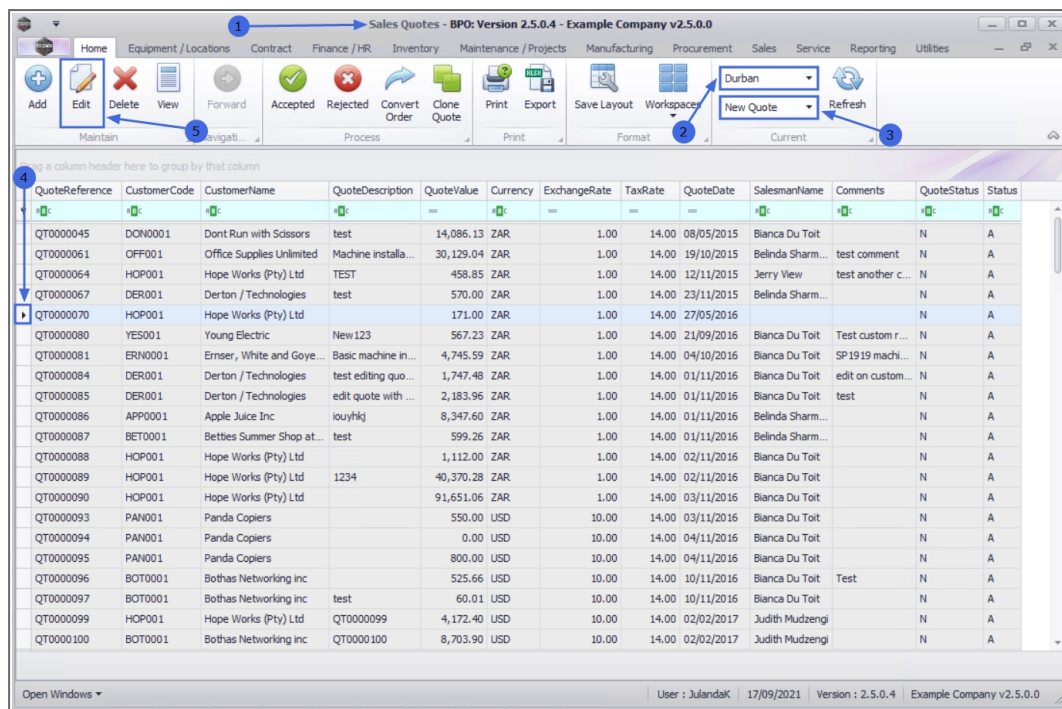
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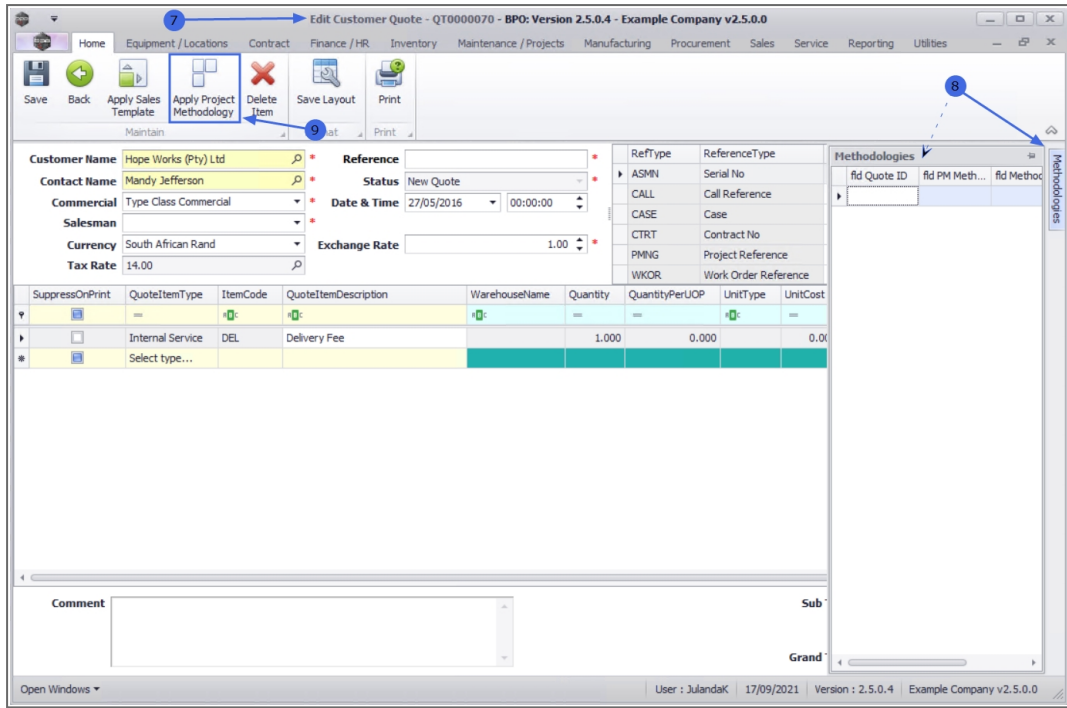
1. The **Sales Quotes** Listing screen will be displayed.
2. Select the **Site** where the quote can be located.
  - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **New Quote**.
4. Click on the **row** of the quote you wish to apply a Methodology to.
5. Click on **Edit**.



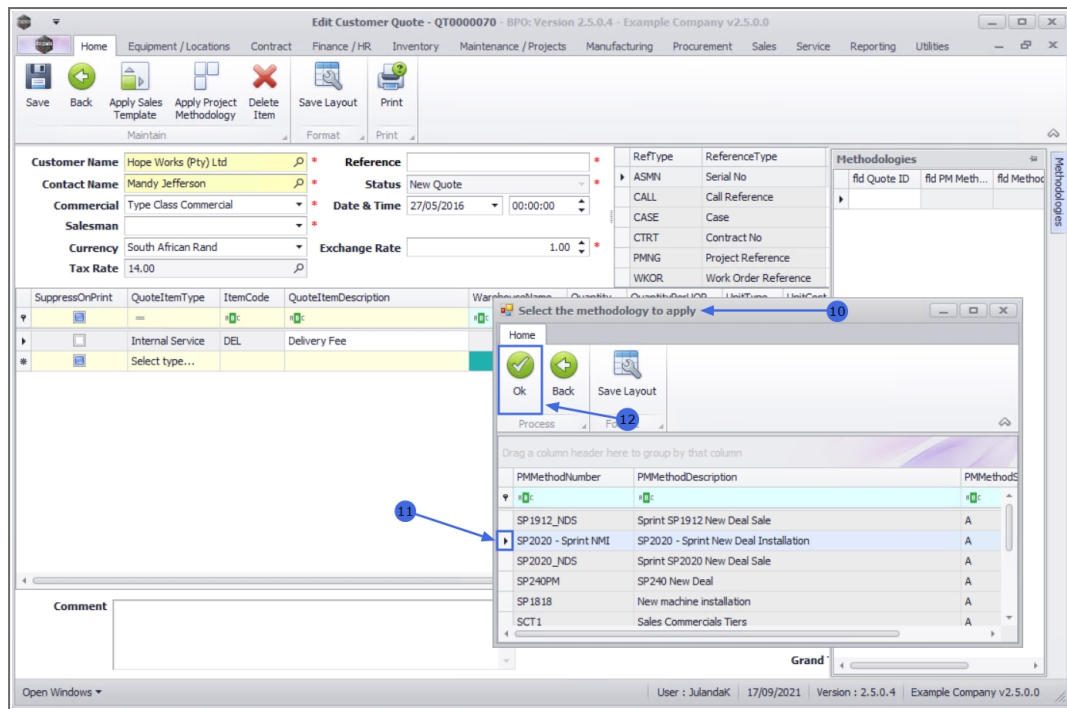
Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.



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.

Edit Customer Quote - QT0000070 - 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

Save Back Apply Sales Template Apply Project Methodology Delete Item Save Layout Print

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Customer Name: Hope Works (Pty) Ltd  
 Contact Name: Mandy Jefferson  
 Commercial: Type Class Commercial  
 Salesman:  
 Currency: South African Rand  
 Tax Rate: 14.00

Reference: New Quote  
 Status: New Quote  
 Date & Time: 27/05/2016 00:00:00  
 Exchange Rate: 1.00

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| Quote ID | fd PM Method ID | fd Method No        | fd Method Desc        |
|----------|-----------------|---------------------|-----------------------|
| 70       | 80              | SP2020 - Sprint NMI | SP2020 - Sprint Ne... |

| SuppressOnPrint          | QuoteItem Type   | ItemCode  | QuoteItemDescription           | WarehouseName  | Quantity | Quantit |
|--------------------------|------------------|-----------|--------------------------------|----------------|----------|---------|
| <input type="checkbox"/> | Internal Service | DEL       | Delivery Fee                   |                | 1.000    |         |
| <input type="checkbox"/> | Parts            | SP2020    | SP2020 Sprint Colour MF Copier | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | 2020-147K | Black toner SP2020             | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | 2020-147M | Magenta toner SP2020           | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | 2020-147C | Cyan toner SP2020              | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | 2020-147Y | Yellow toner SP2020            | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | SP2020    | SP2020 Sprint Colour MF Copier | Main Warehouse | 0.000    |         |
| <input type="checkbox"/> | Parts            | 2020-147K | Black toner SP2020             | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | SP19-147K | Black Toner SP1919             | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | SP19-147K | Black Toner SP1919             | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | SP19-147C | Cyan Toner - SP1919            | Main Warehouse | 1.000    |         |
| <input type="checkbox"/> | Parts            | SP19-147C | Cyan Toner - SP1919            | Main Warehouse | 1.000    |         |

Comment

Open Windows

User : JulandaK 17/09/2021 Version : 2.5.0.4 Example Company v2.5.0.0

MNU.062.010

