

## SERVICE

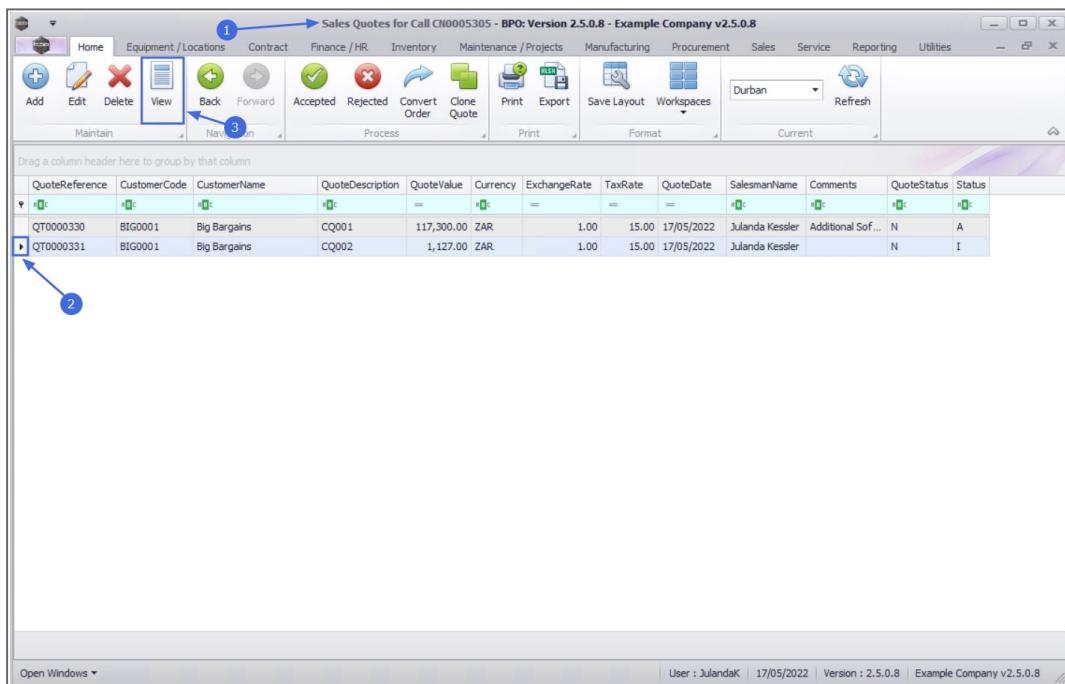
### CALLS – ADD A QUOTE

You may need to raise a quote for additional work that must be done, but needs approval from the client, as it will be billed.

Once the client has approved the quote, it can be processed further:

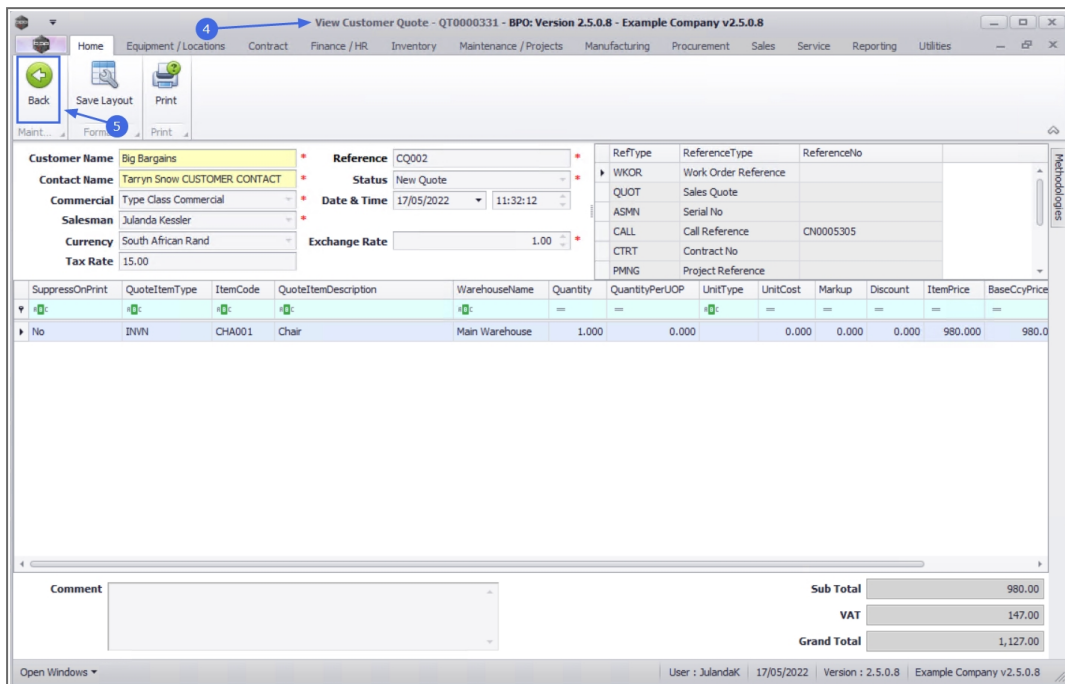
- [Convert to Sales Order](#)
- [Add Items to WO](#)

**Ribbon Access:** *Service > Calls*



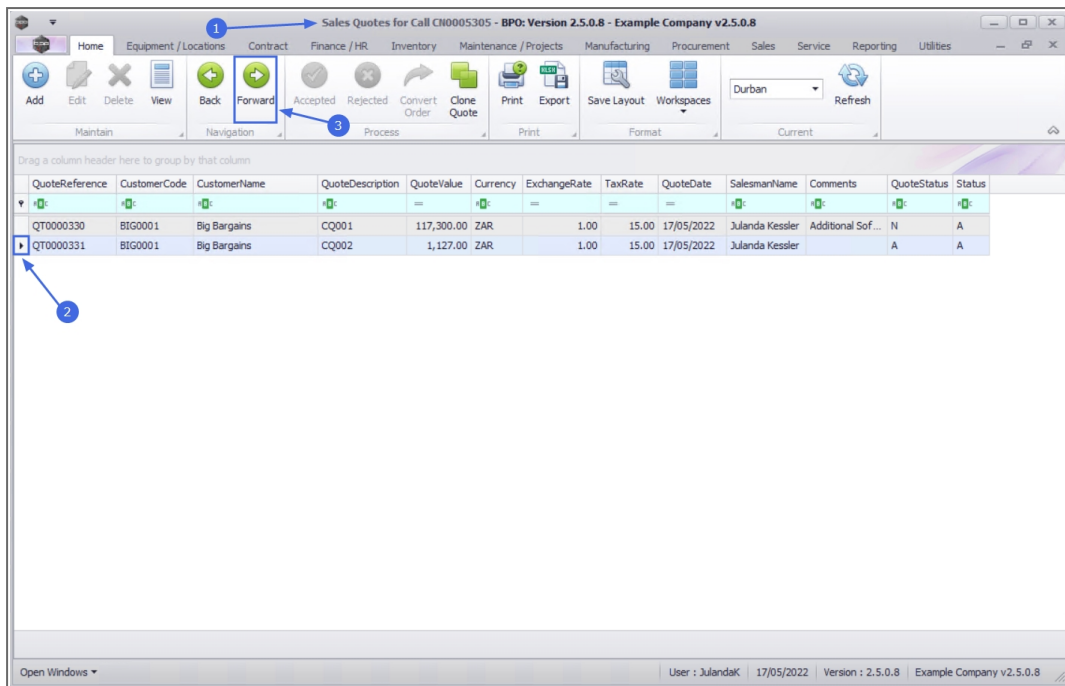
The **Call Listing** screen will be displayed.

- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.



## SELECT THE CALL

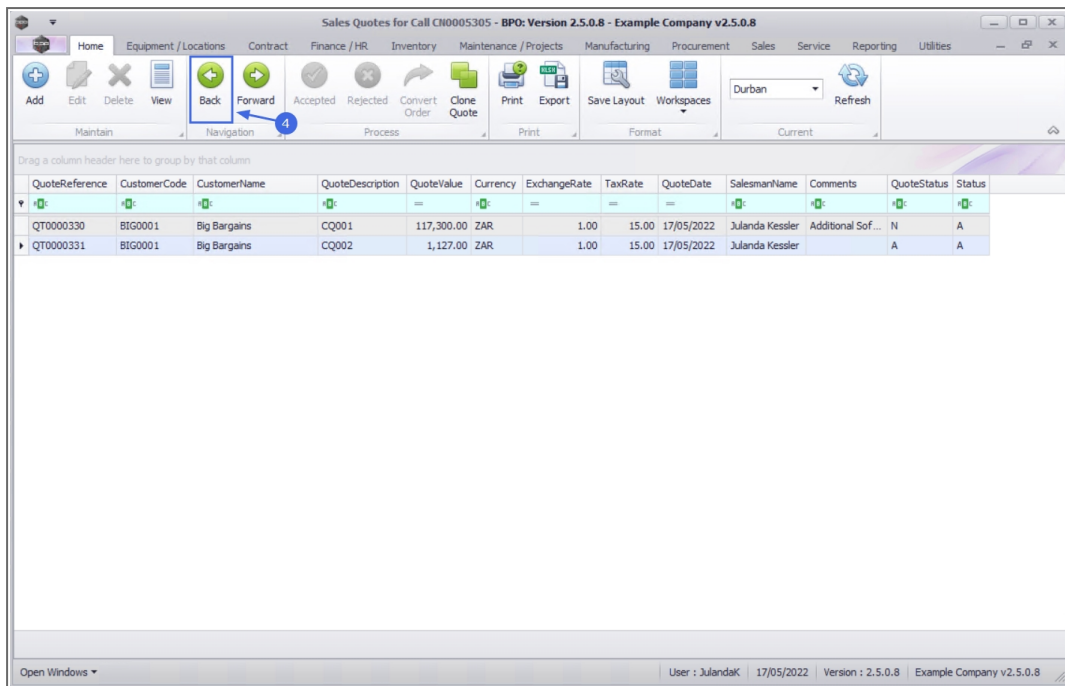
- Click on the **row selector** in front of the **call** you wish to raise a **quote** for.
- Click on **Edit**.



## ADD A QUOTE

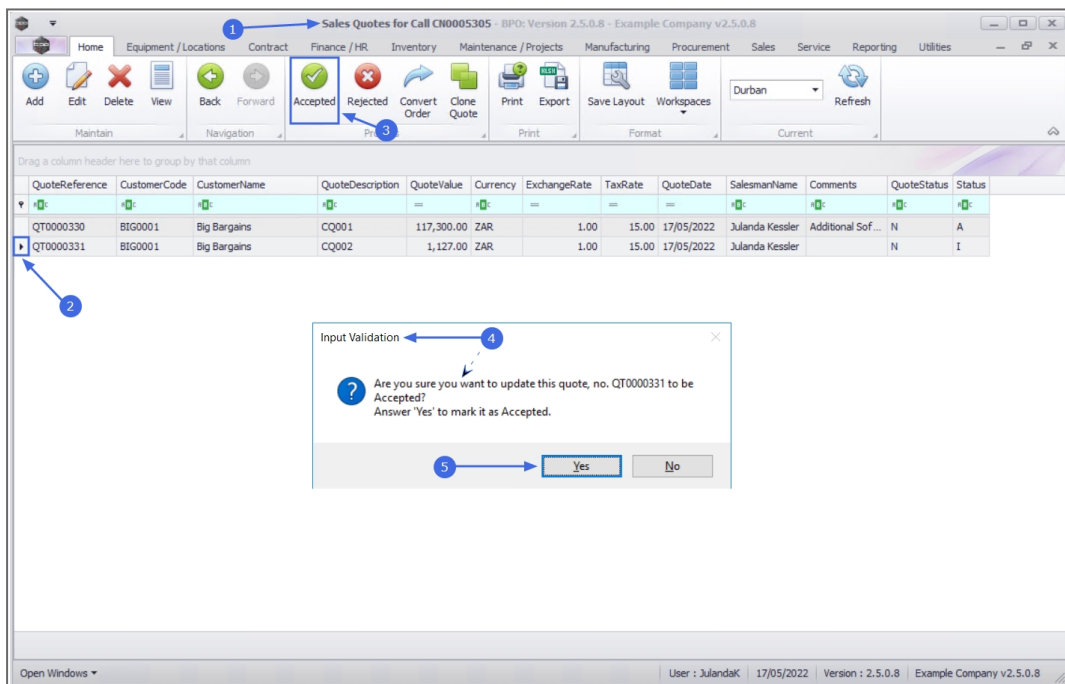
The **Call maintenance: Call ref. - [ ]** screen will be displayed.

- Click on the **Quotes** tile.



The **Sales Quotes for Call [ ]** screen will be displayed.

- Click on **Add**.

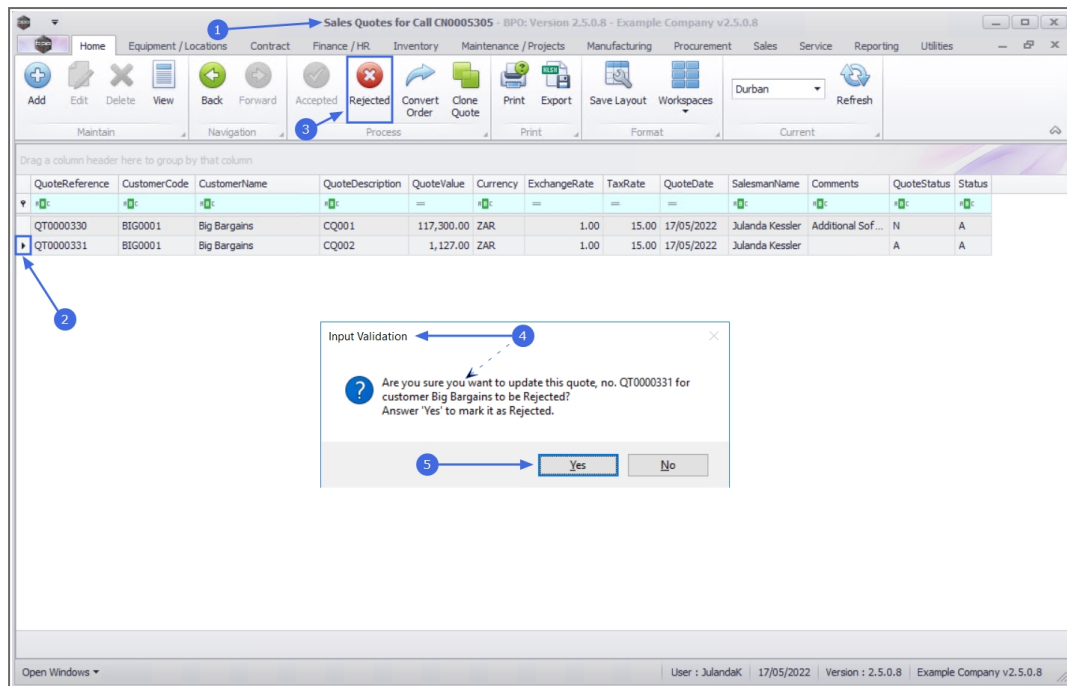


The **Add new Customer Quote** screen will be displayed.

## CUSTOMER INFO

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- **Customer:** This will auto populate with the customer linked to this call.
- **Contact Name:** This will auto populate with the contact linked to this call but you can click on the search button and select an alternative contact if required.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required.
- **Salesman:** This will auto populate with the person currently creating the sales quote but you can click on the search button and select an alternative salesman if required.
- **Reference:** Type in a reference for the quote.
- **Status:** This will auto populate as New quote.
- **Date and Time:** These will auto populate with the current date time but
- You can either type in or click on the drop down arrow and use the calendar function to select an alternative date if required.
- You can either type in or use the arrow indicators to select an alternative time if required.



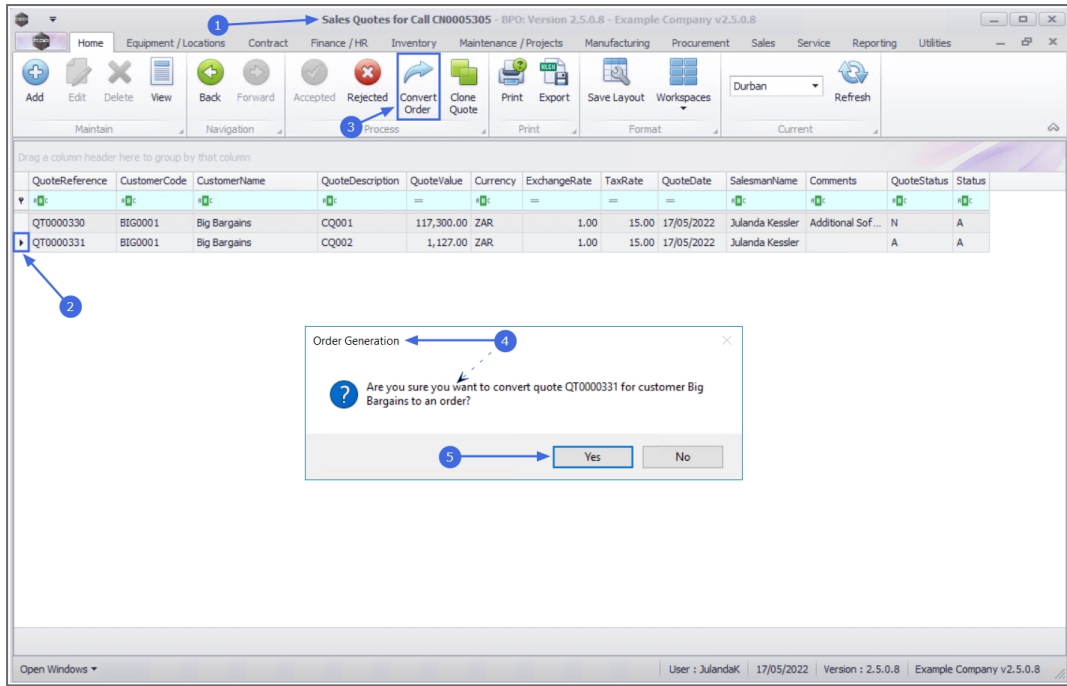
Drag a column header here to group by that column

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate  | SalesmanName    | Comments          | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|------------|-----------------|-------------------|-------------|--------|
| QT0000330      | BTG0001      | Big Bargains | CQ001            | 117,300.00 | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler | Additional Sof... | N           | A      |
| QT0000331      | BTG0001      | Big Bargains | CQ002            | 1,127.00   | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler |                   | A           | A      |

Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

## FINANCIAL INFO

- **Currency:** This will populate based on the currency set up on the customer. Use the drop down arrow to display the currency menu and select a different currency if required.
- **Tax Rate:** This will populate based on the tax rate set up on the customer. Click on the search button and select an alternative rate if required.
- **Exchange Rate:** This will populate based on the currency set up on the customer. Type in or use the directional arrows to select a new rate if required.

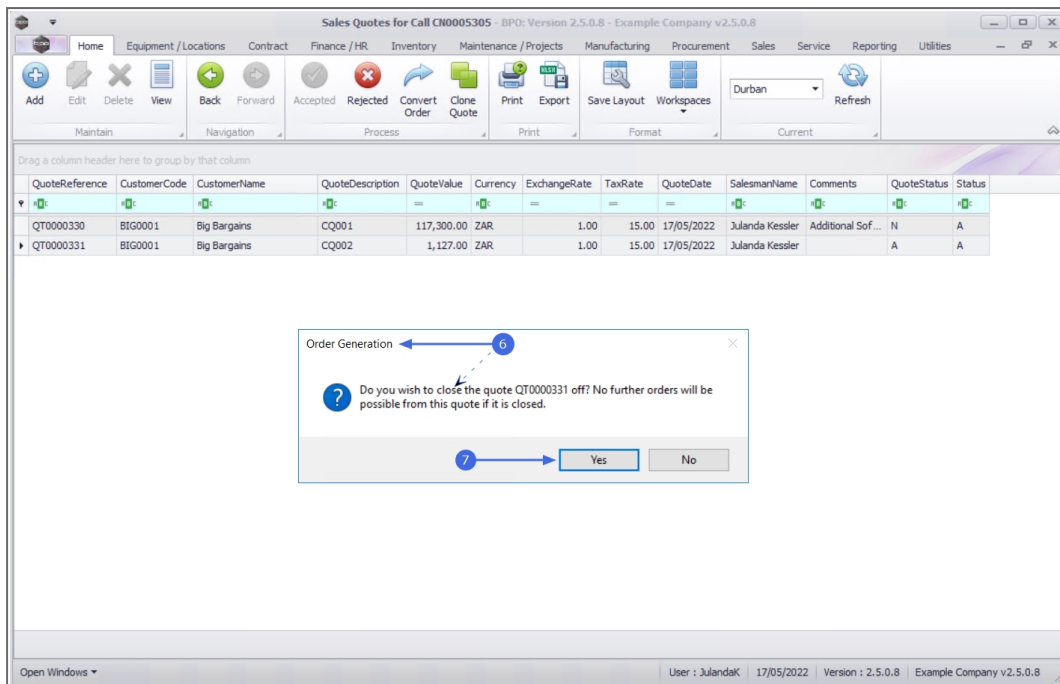


The screenshot shows the 'Sales Quotes for Call' window in the CO3 system. The window title is 'Sales Quotes for Call CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8'. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Add, Edit, Delete, View, Back, Forward, Accepted, Rejected, Convert Order, Clone Quote, Print, Export, Save Layout, Workspaces, and Refresh. A dropdown menu shows 'Durban'. The main area displays a table of quotes with columns: QuoteReference, CustomerCode, CustomerName, QuoteDescription, QuoteValue, Currency, ExchangeRate, TaxRate, QuoteDate, SalesmanName, Comments, QuoteStatus, and Status. Two quotes are listed: QT0000330 and QT0000331. The 'Convert Order' button is highlighted with a blue arrow labeled '1'. The 'QT0000331' row is selected with a blue arrow labeled '2'. An 'Order Generation' dialog box is open, asking 'Are you sure you want to convert quote QT0000331 for customer Big Bargains to an order?'. The dialog has a question mark icon and 'Yes' and 'No' buttons. A blue arrow labeled '3' points to the 'Convert Order' button, a blue arrow labeled '4' points to the dialog box, and a blue arrow labeled '5' points to the 'Yes' button. The status bar at the bottom shows 'Open Windows', 'User : JulandaK', '17/05/2022', 'Version : 2.5.0.8', and 'Example Company v2.5.0.8'.

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate  | SalesmanName    | Comments          | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|------------|-----------------|-------------------|-------------|--------|
| QT0000330      | BTG0001      | Big Bargains | CQ001            | 117,300.00 | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler | Additional Sof... | N           | A      |
| QT0000331      | BTG0001      | Big Bargains | CQ002            | 1,127.00   | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler |                   | A           | A      |

## CROSS REFERENCES

- This frame will populate with the Call Reference No. as this sales quote is being raised from a **call**. The Serial No. and Contract No. fields will also auto populate if applicable.



Drag a column header here to group by that column

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate  | SalesmanName    | Comments          | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|------------|-----------------|-------------------|-------------|--------|
| QT0000330      | BTG0001      | Big Bargains | CQ001            | 117,300.00 | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler | Additional Sof... | N           | A      |
| QT0000331      | BTG0001      | Big Bargains | CQ002            | 1,127.00   | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler |                   | A           | A      |

Order Generation

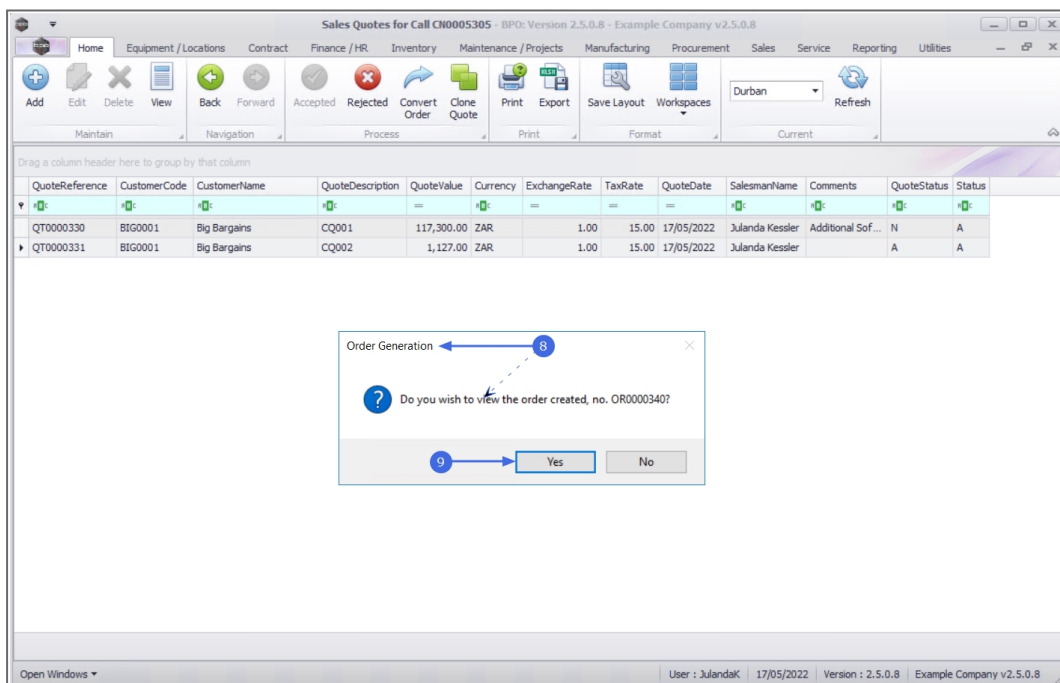
Do you wish to close the quote QT0000331 off? No further orders will be possible from this quote if it is closed.

Yes No

User : JulandaK | 17/05/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

## COMMENTS

- Type in a **comment** for this quote if required. This comment will appear on the **sales quote document**.



Drag a column header here to group by that column

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate  | SalesmanName    | Comments          | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|------------|-----------------|-------------------|-------------|--------|
| QT0000330      | BTG0001      | Big Bargains | CQ001            | 117,300.00 | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler | Additional Sof... | N           | A      |
| QT0000331      | BTG0001      | Big Bargains | CQ002            | 1,127.00   | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler |                   | A           | A      |

Order Generation

Do you wish to view the order created, no. OR0000340?

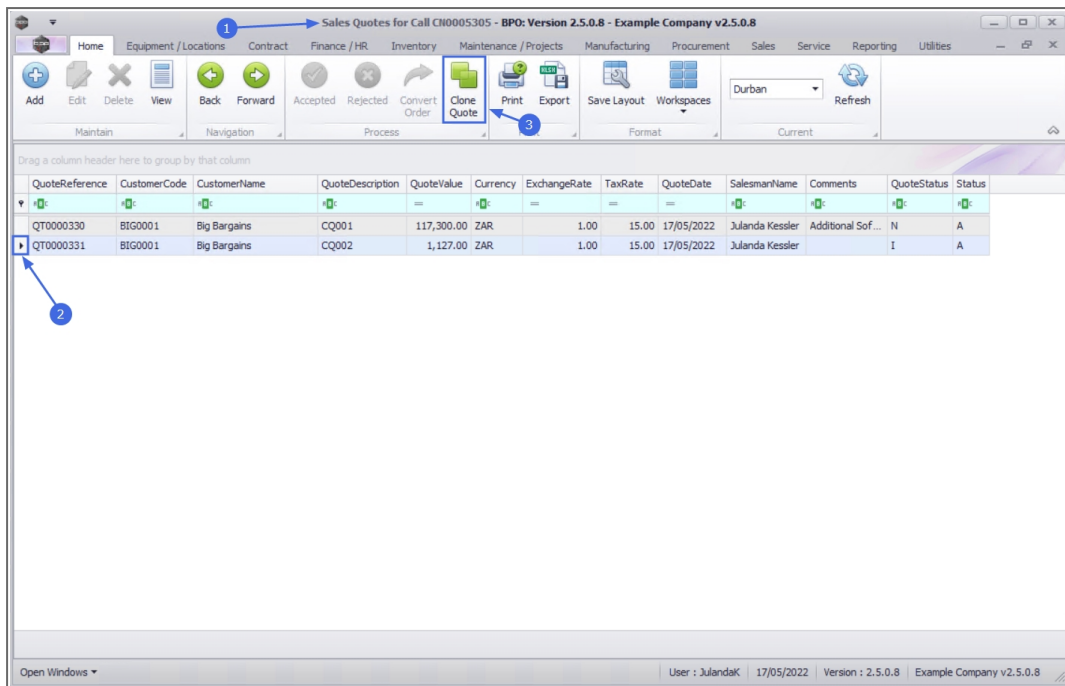
Yes No

User : JulandaK | 17/05/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

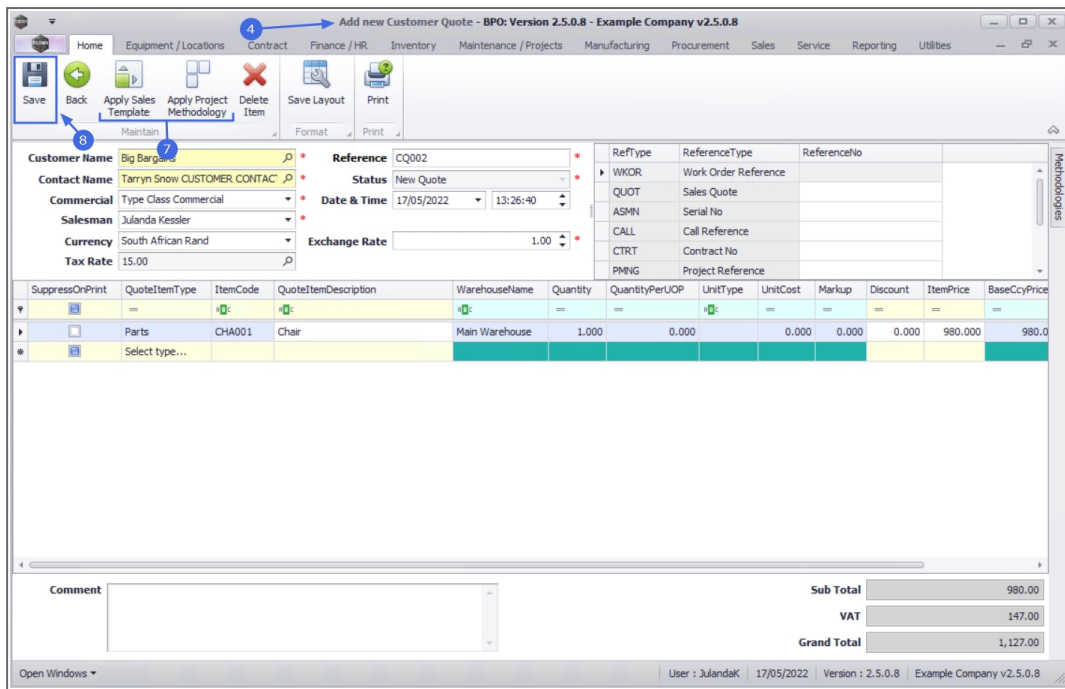
## QUOTE ITEMS

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- Click on the quote **Item Type** text box to reveal a drop down arrow.
- Click on this arrow to bring up the **Item Type** menu.
- Select from this menu, one of the following;
  - **CRFT** (Labour craft, i.e. Technician)
  - **CTRT** (Third Party Labour/Service)
  - **EXPS** (Expenses)
  - **INVN** (Part)
  - **SERV** (Internal Labour/Service)
  - **TRVL** (Travel)
  - **WARR** (Warranty sale)
  - **OTHR** (Type in any additional items to quote, but this will **not** be pulled over when quote is converted to a sales order. If quote is confirmed, this item can be set up as a part / service and linked to the quote in it's place).
- In this image **Parts** has been selected.



- Click on the quote **Item Code** text box to reveal an **ellipsis** button.
- Click on this button to bring up the **Select a part** menu.
  - **Note:** The 'Select a [...]' screen displayed, will be according to the **Item Type** initially selected i.e. if **Labour** had been initially selected then a **Select a craft** screen would pop up.



4 Add new Customer Quote - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

8 Save

7 Maintain

Customer Name: Big Bargains

Contact Name: Tarryn Snow CUSTOMER CONTACT

Commercial: Type Class Commercial

Salesman: Julanda Kessler

Currency: South African Rand

Tax Rate: 15.00

Reference: CQ002

Status: New Quote

Date & Time: 17/05/2022 13:26:40

Exchange Rate: 1.00

| SuppressOnPrint | QuoteItemType  | ItemCode | QuoteItemDescription | WarehouseName  | Quantity | QuantityPerUOP | UnitType | UnitCost | Markup | Discount | ItemPrice | BaseCcyPrice |
|-----------------|----------------|----------|----------------------|----------------|----------|----------------|----------|----------|--------|----------|-----------|--------------|
|                 | Parts          | CHA001   | Chair                | Main Warehouse | 1.000    | 0.000          |          | 0.000    | 0.000  | 0.000    | 980.000   | 980.0        |
|                 | Select type... |          |                      |                |          |                |          |          |        |          |           |              |

Comment:

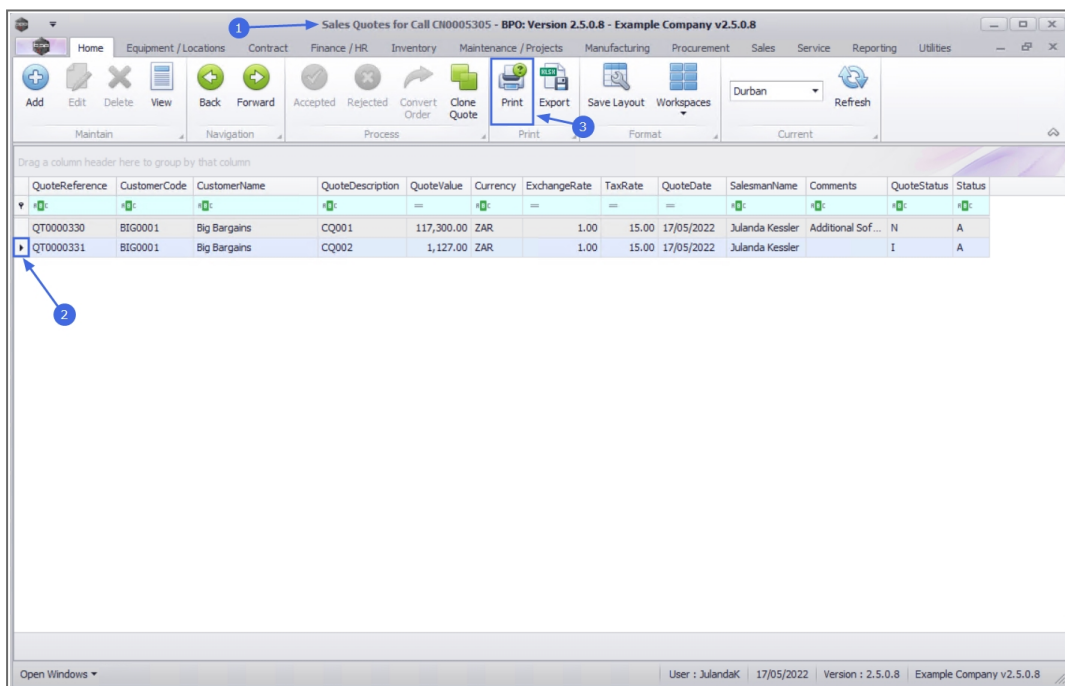
Sub Total: 980.00

VAT: 147.00

Grand Total: 1,127.00

User: JulandaK | 17/05/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

- Click on the **row selector** in front of the **part** you wish to **add** to this quote.
- Click on **Ok**.



1 Sales Quotes for Call CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

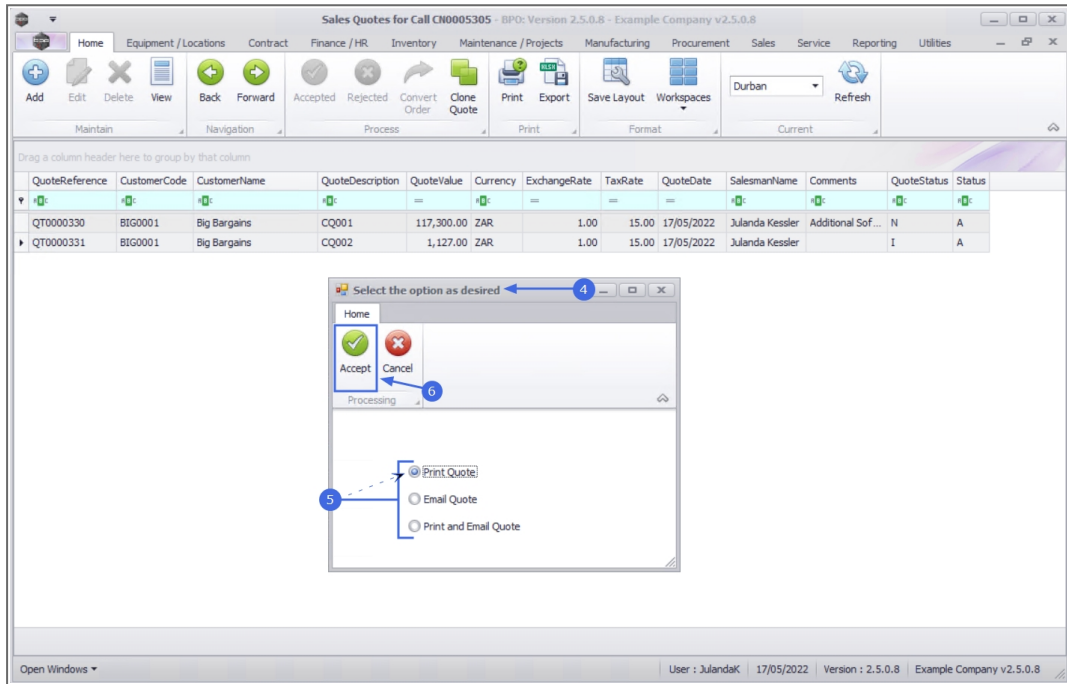
3 Print

2

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate  | SalesmanName    | Comments          | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|------------|-----------------|-------------------|-------------|--------|
| QT0000330      | BTG0001      | Big Bargains | CQ001            | 117,300.00 | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler | Additional Sof... | N           | A      |
| QT0000331      | BTG0001      | Big Bargains | CQ002            | 1,127.00   | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler |                   | I           | A      |

User: JulandaK | 17/05/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

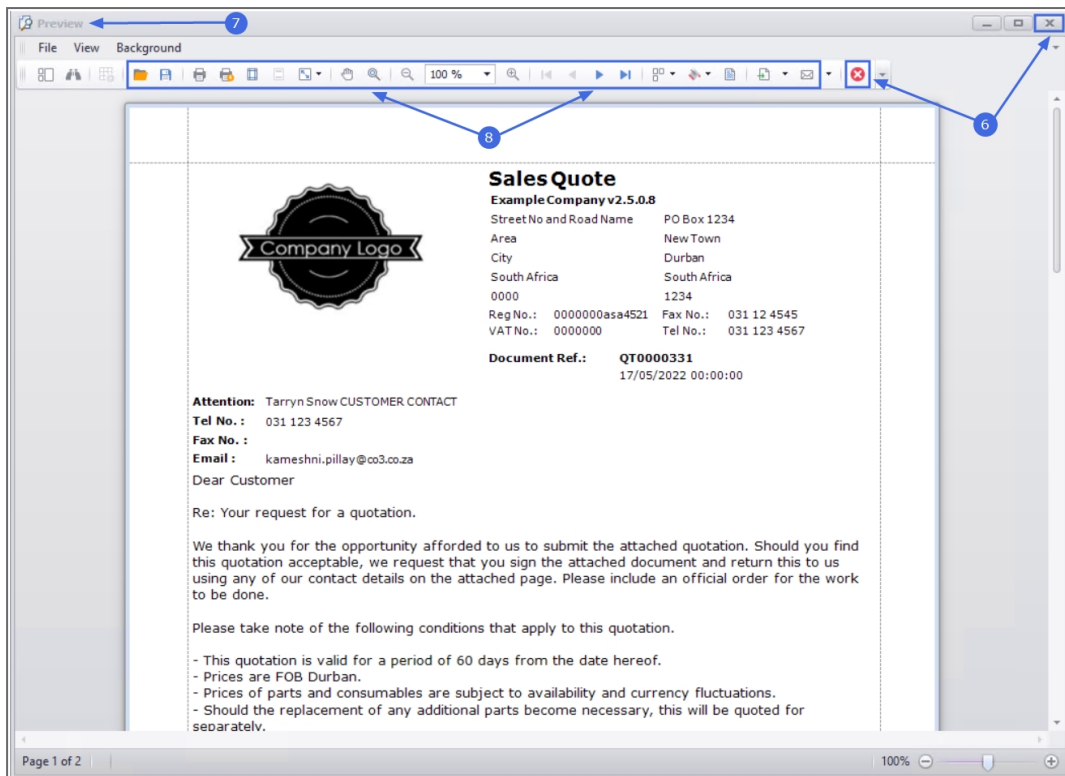
- The **Quote Item Description** and **Warehouse Name** fields will auto populate once you have selected the **Item Code**.
- Edit the **Quantity**, **Discount** and **Item Price** as required by clicking in each of their text boxes and either using the **directional arrows** or **typing** in the correct amounts.
- **Note:** To **add** in a new line, click on the last text box in the row and press the **Enter** key.



| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate  | SalesmanName    | Comments          | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|------------|-----------------|-------------------|-------------|--------|
| QT0000330      | BTG0001      | Big Bargains | CQ001            | 117,300.00 | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler | Additional Sof... | N           | A      |
| QT0000331      | BTG0001      | Big Bargains | CQ002            | 1,127.00   | ZAR      | 1.00         | 15.00   | 17/05/2022 | Julanda Kessler |                   | I           | A      |

## SAVE QUOTE

- When you have finished adding the details to this screen, click on **Save**.



- You will return to the *Sales Quotes for Call [ ]* screen where you can **view** the details of the newly created *sales quote*.

Sales Quotes for Call CN0000505 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Back Forward Accepted Rejected Convert Order Print Save Layout Workspaces

Durban New quote Refresh

Maintain Navigation Process Print Format Current

Drag a column header here to group by that column

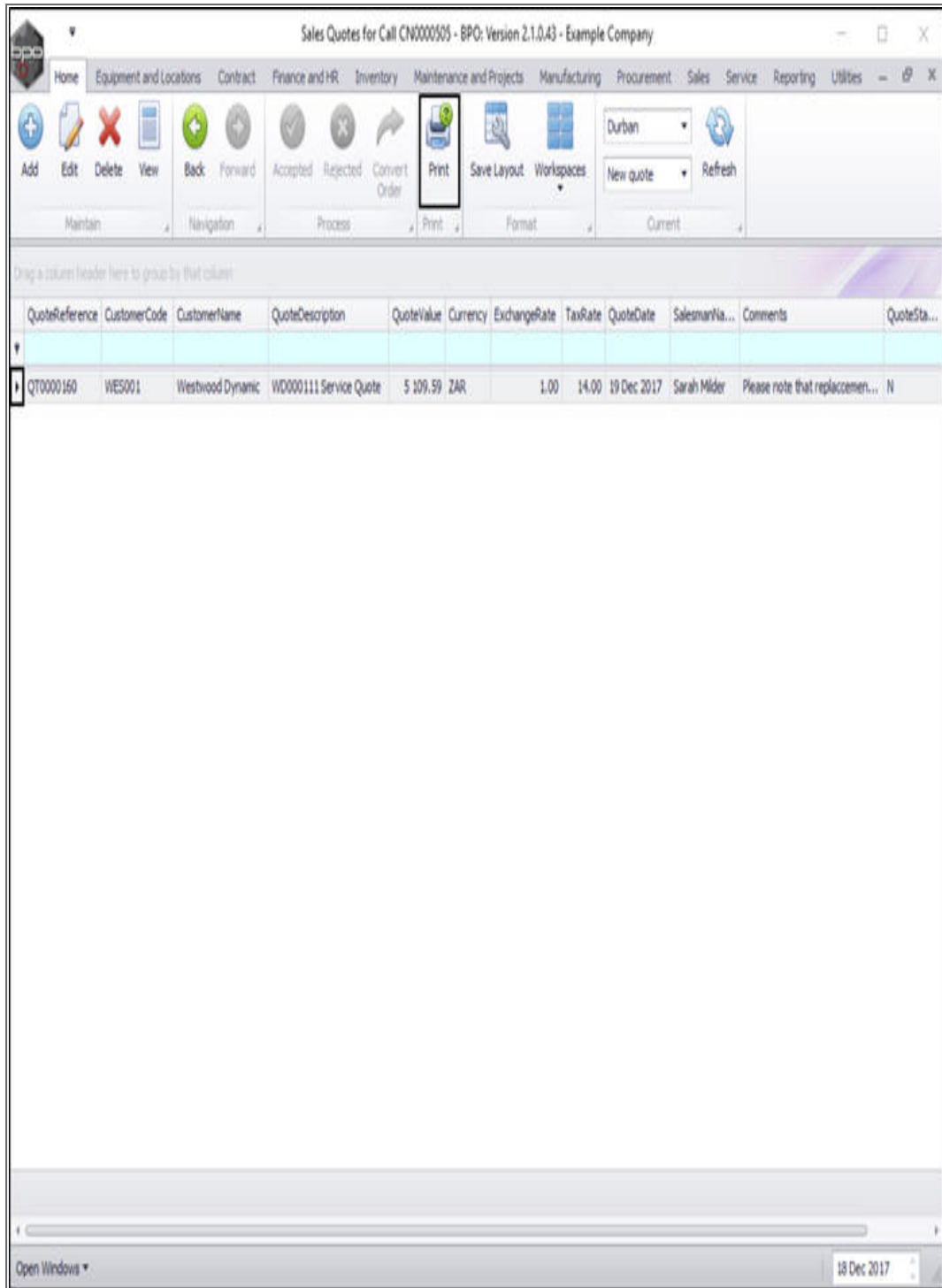
| QuoteReference | CustomerCode | CustomerName     | QuoteDescription        | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate   | SalesmanNa... | Comments                       | QuoteSta... |
|----------------|--------------|------------------|-------------------------|------------|----------|--------------|---------|-------------|---------------|--------------------------------|-------------|
| QT0000160      | WES001       | Westwood Dynamic | WD0001111 Service Quote | 5 109.59   | ZAR      | 1.00         | 14.00   | 19 Dec 2017 | Sarah Milder  | Please note that replacemen... | N           |

Open Windows 18 Dec 2017

## PRINT QUOTE

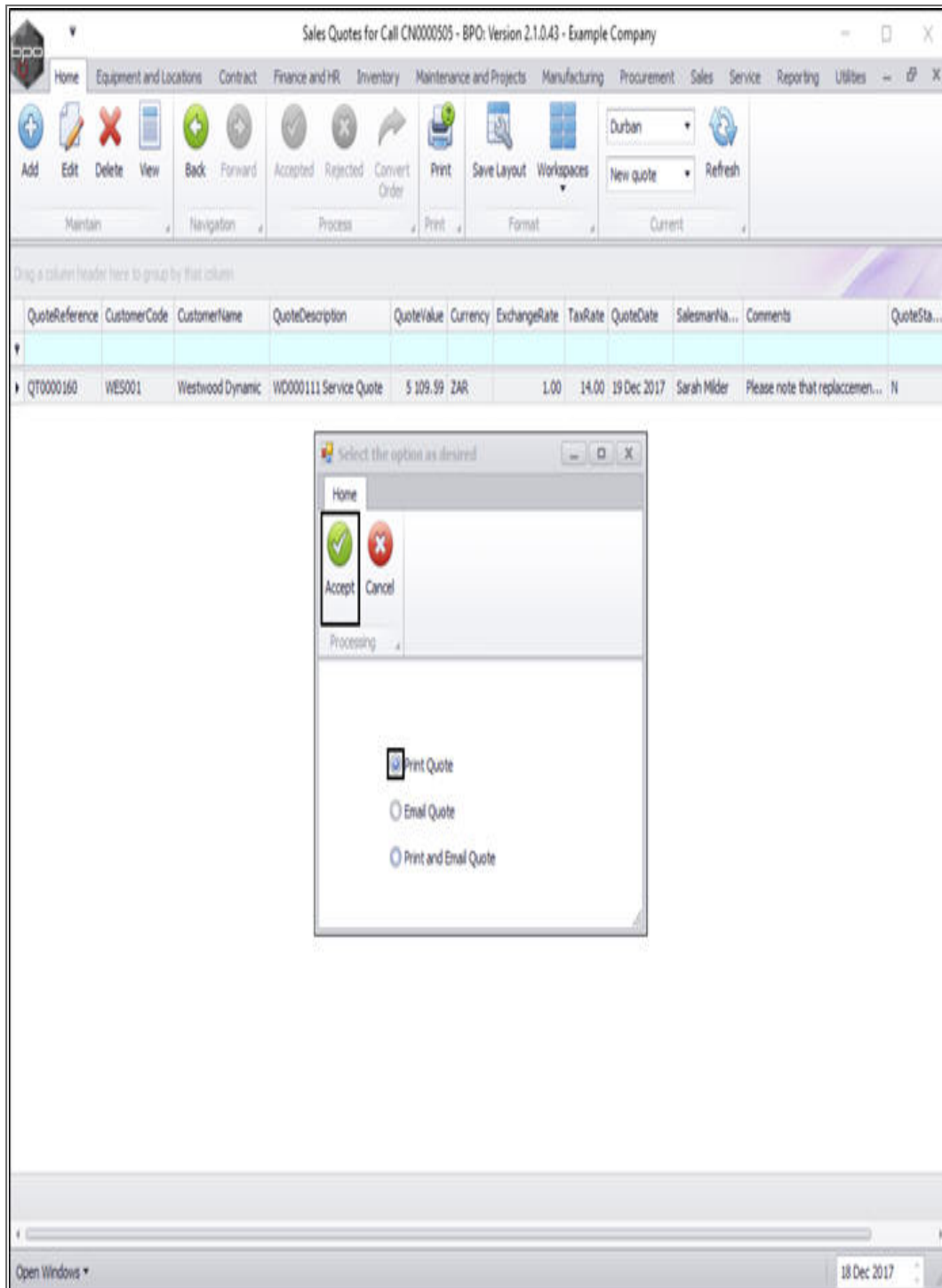
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- In the *Sales Quotes for Call [ ]* screen, click on the *row selector* in front of the *quote* that you wish to *print*.
- Click on *Print*.



- A **Select the option as desired** screen will pop up with print and email choices.

- Click on **Print Quote**.
- Click on **Accept**.

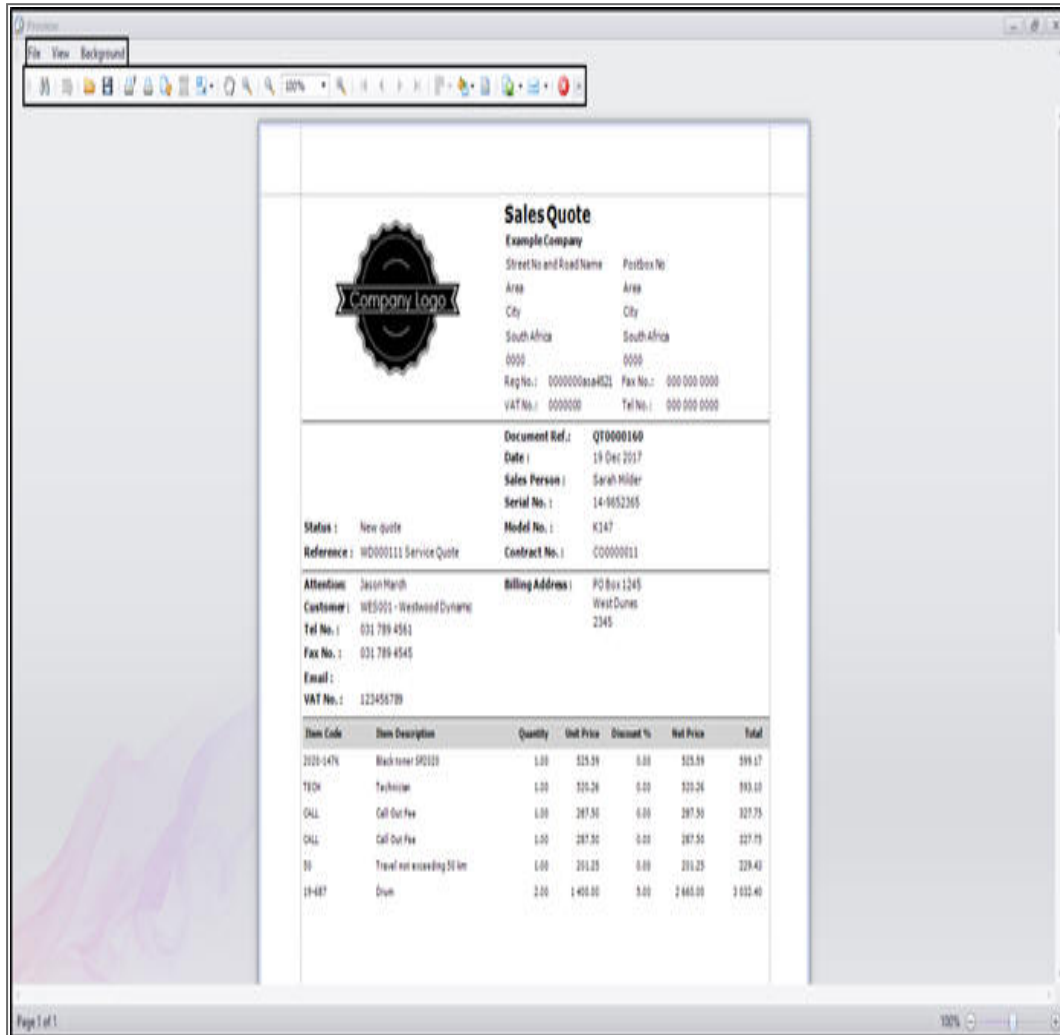


The screenshot displays the 'Sales Quotes for Call CN0000505 - BPO: Version 2.1.0.43 - Example Company' application. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Back, Forward, Accepted, Rejected, Convert Order, Print, Save Layout, Workspaces, New quote, and Refresh. A table lists quotes with columns: QuoteReference, CustomerCode, CustomerName, QuoteDescription, QuoteValue, Currency, ExchangeRate, TaxRate, QuoteDate, SalesmanName, Comments, and QuoteStatus. One quote is visible: QT0000160, WES001, Westwood Dynamic, WD0001111 Service Quote, 5 109.59 ZAR, 1.00, 14.00, 19 Dec 2017, Sarah Milder, Please note that replacemen..., N. A modal dialog titled 'Select the option as desired' is open, showing 'Accept' (checked) and 'Cancel' buttons, and a 'Processing' status. Below the dialog, there are radio buttons for 'Print Quote' (selected), 'Email Quote', and 'Print and Email Quote'. The bottom status bar shows 'Open Windows' and the date '18 Dec 2017'.

| QuoteReference | CustomerCode | CustomerName     | QuoteDescription        | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate   | SalesmanName | Comments                       | QuoteSta... |
|----------------|--------------|------------------|-------------------------|------------|----------|--------------|---------|-------------|--------------|--------------------------------|-------------|
| QT0000160      | WES001       | Westwood Dynamic | WD0001111 Service Quote | 5 109.59   | ZAR      | 1.00         | 14.00   | 19 Dec 2017 | Sarah Milder | Please note that replacemen... | N           |

The **Report Preview** screen will be displayed.

- From here you can **View, Print, Export** or **Email** the sales quote.
- **Close** the Report Preview screen when done.



**Sales Quote**

**Example Company**  
 Street No and Road Name      Postbox No  
 Area      Area  
 City      City  
 South Africa      South Africa  
 0000      0000  
 Reg No.: 00000000000000000000      Fax No.: 000 000 0000  
 VAT No.: 00000000      Tel No.: 000 000 0000

**Document Ref.:** QT0000160  
**Date:** 19 Oct 2017  
**Sales Person:** Sarah Miller  
**Serial No.:** 14-9652365  
**Model No.:** K147  
**Contract No.:** C00000011

**Status:** New quote  
**Reference:** WD000111 Service Quote

**Attention:** Jason Marsh  
**Customer:** WES001 - Westwood Dynamic  
**Tel No.:** 021 789 4561  
**Fax No.:** 021 789 4545  
**Email:**  
**VAT No.:** 123456789

**Billing Address:** PO Box 1245  
 West Dunes  
 2345

| Item Code | Item Description           | Quantity | Unit Price | Discount % | Net Price | Total   |
|-----------|----------------------------|----------|------------|------------|-----------|---------|
| 2020-1476 | Black inner SP0100         | 1.00     | \$25.59    | 0.00       | \$25.59   | \$25.59 |
| TECH      | Technician                 | 1.00     | \$20.26    | 0.00       | \$20.26   | \$20.26 |
| CALL      | Call Out Fee               | 1.00     | \$27.50    | 0.00       | \$27.50   | \$27.50 |
| CALL      | Call Out Fee               | 1.00     | \$27.50    | 0.00       | \$27.50   | \$27.50 |
| 90        | Travel not exceeding 50 km | 1.00     | \$21.25    | 0.00       | \$21.25   | \$21.25 |
| 19-687    | Drum                       | 2.00     | \$40.00    | 0.00       | \$80.00   | \$80.00 |

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