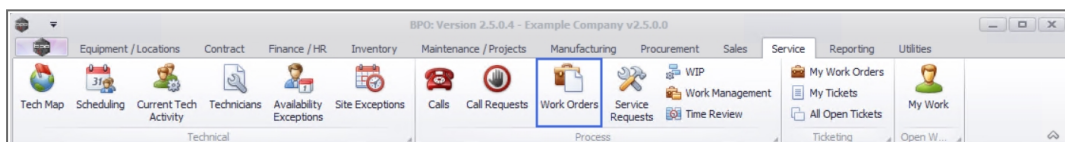


SERVICE

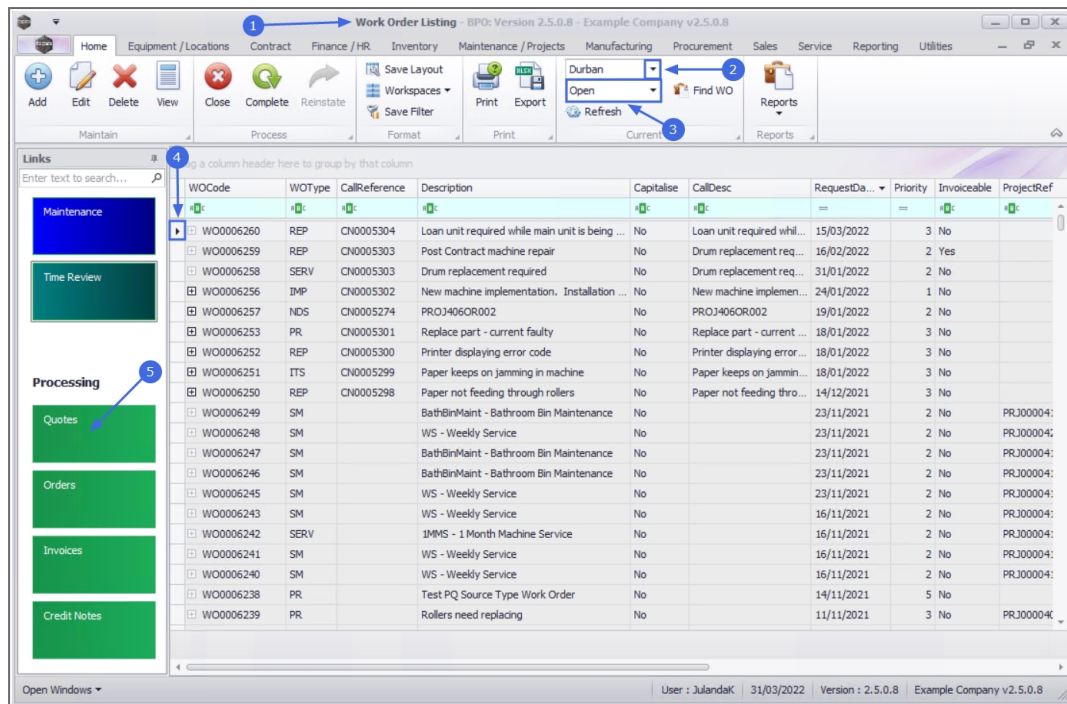
WORK ORDERS – SALES QUOTES

If additional work is required, that is not covered within the service contract, then a quote can be raised for the customer. The customer needs to however approve the quotation on the work order first.

Ribbon Access: *Service > Work Orders*



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site**.
 - The example has **Durban** selected.
3. Change the **Status** to **Open**.
4. Click on the **row** of the **work order** you wish to create a sales quotes for.
5. Click on the **Quotes** tile.



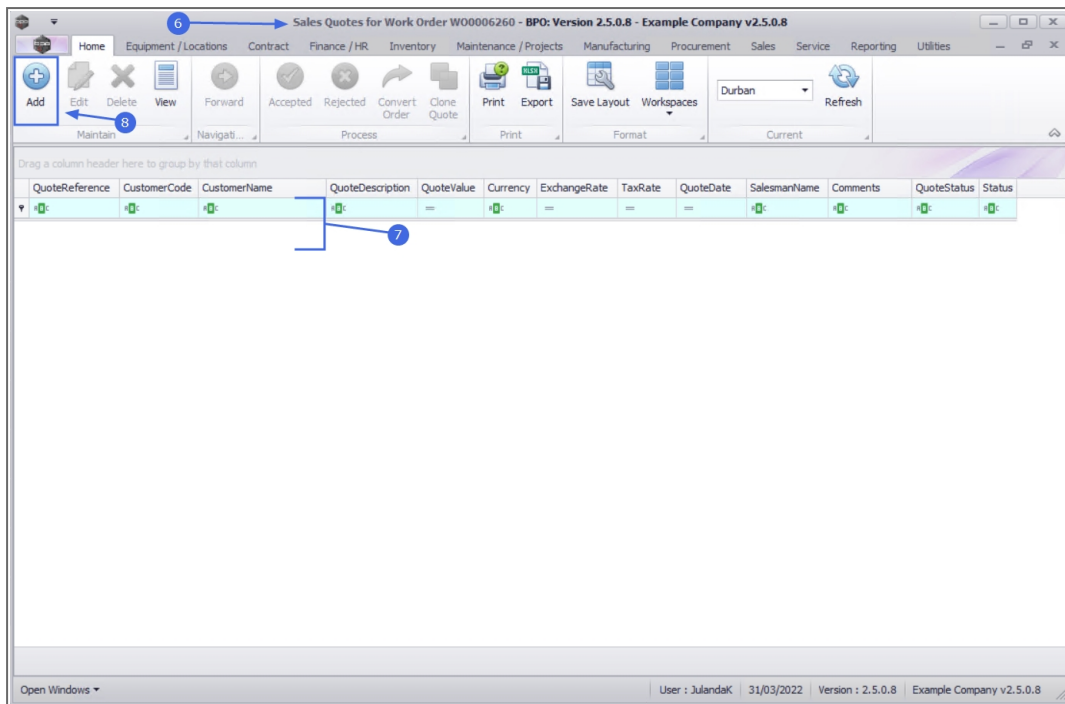
6. The **Sales Quotes for Work Order** [work order number] screen will be displayed.
7. Any quotes that have already been created for the work order, will be listed on this screen.

ADD SALES QUOTE

8. Click on **Add**.



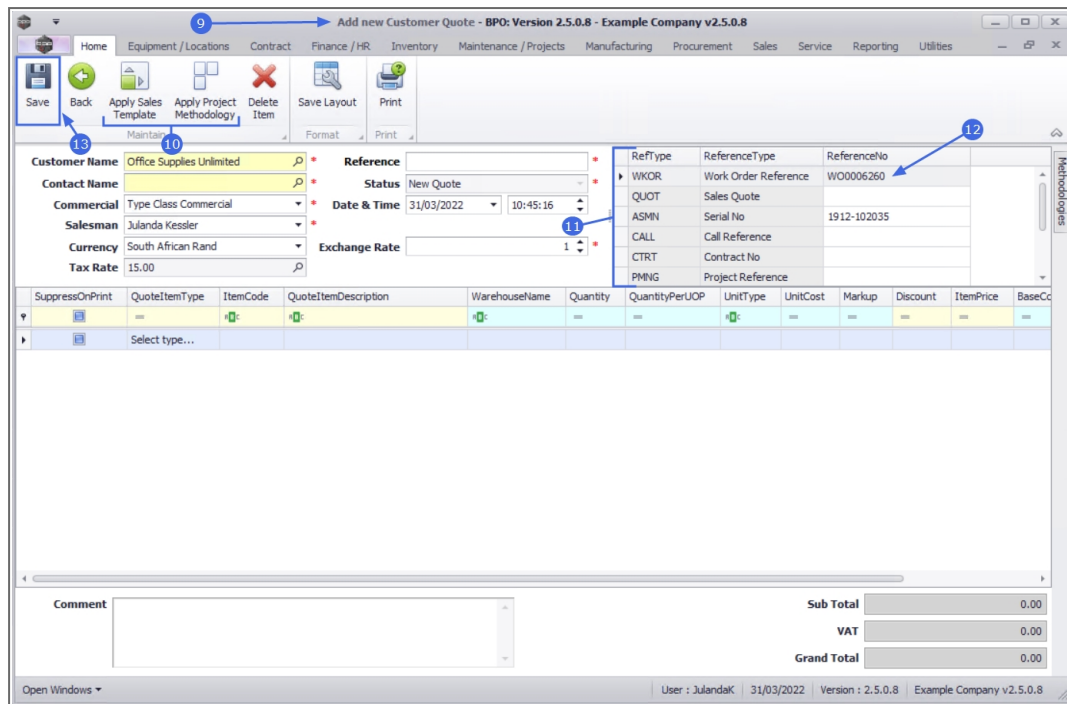
Short cut key: *Right click* to display the *All groups* menu list. Click on *Add*.



9. "The Add new Customer Quote screen will display. " on page 2
10. You have the option to [Quotes - Apply Sales Template](#) or [Projects - Apply Project Methodology](#) to the sales quote.

CROSS REFERENCE

11. This frame will display all the **linked references** linked to this project, e.g. call number, serial number.
12. When a quote is created for a work order from the Project Listing screen, then the **Work Order Reference** number will be auto linked to the quote.
13. When you have completed the quote information, click on **Save**.



You will return to the *Sales Quotes for Work Order* screen.

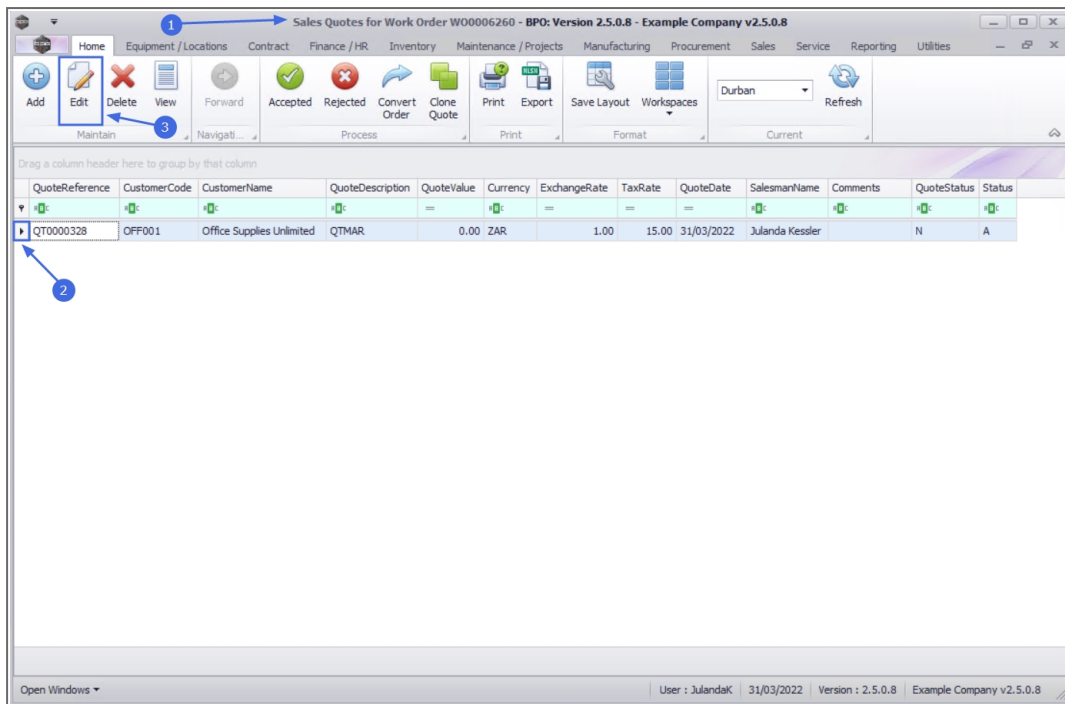
EDIT QUOTE

Only Quotes with a *N - New Quote* in the *Quote Status* column can be edited.

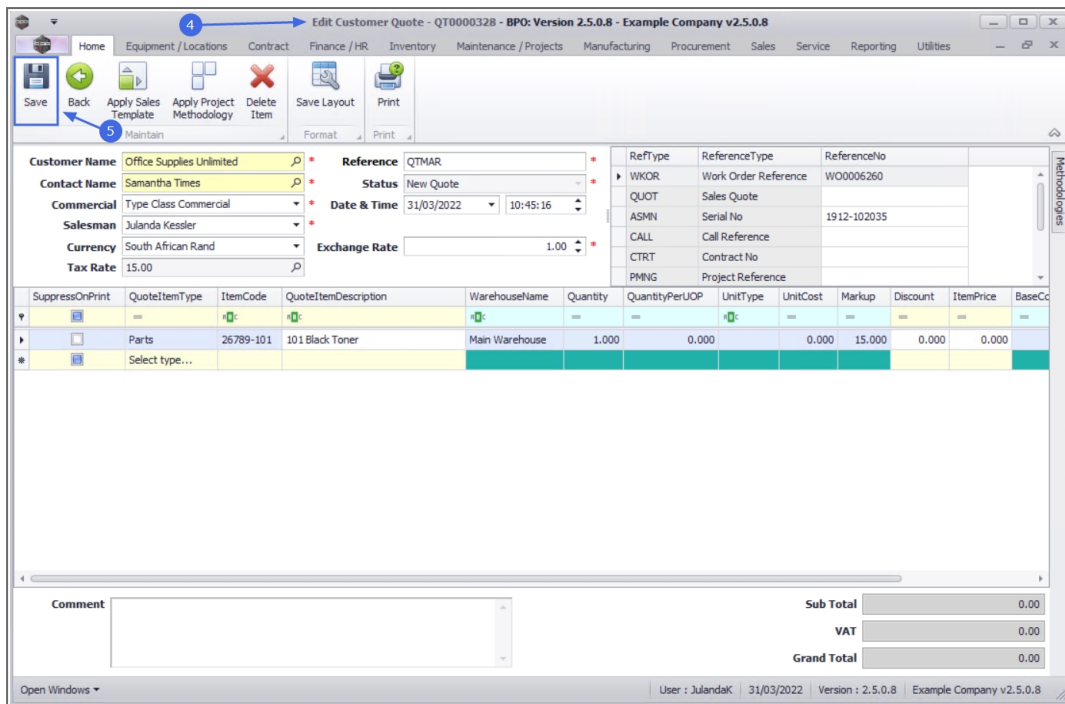
1. From the *Sales Quotes for Work Order Code [work order number]* screen,
2. Click on the **row** of the Quote you wish to make changes to.
3. Click on **Edit**.



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



4. "The Edit Customer Quote - QT[quote number] screen will display." on page 2
 - You have the option to [Quotes - Apply Sales Template](#) as well as [Quotes - Apply Project Methodology](#) to the Quote.
 - Make changes to the **Heading Information** or to Items in the **Sales Items grid**.
5. Click on **Save** to save the changes and to return to the **Sales Quotes for Project** listing screen.



DELETE QUOTE

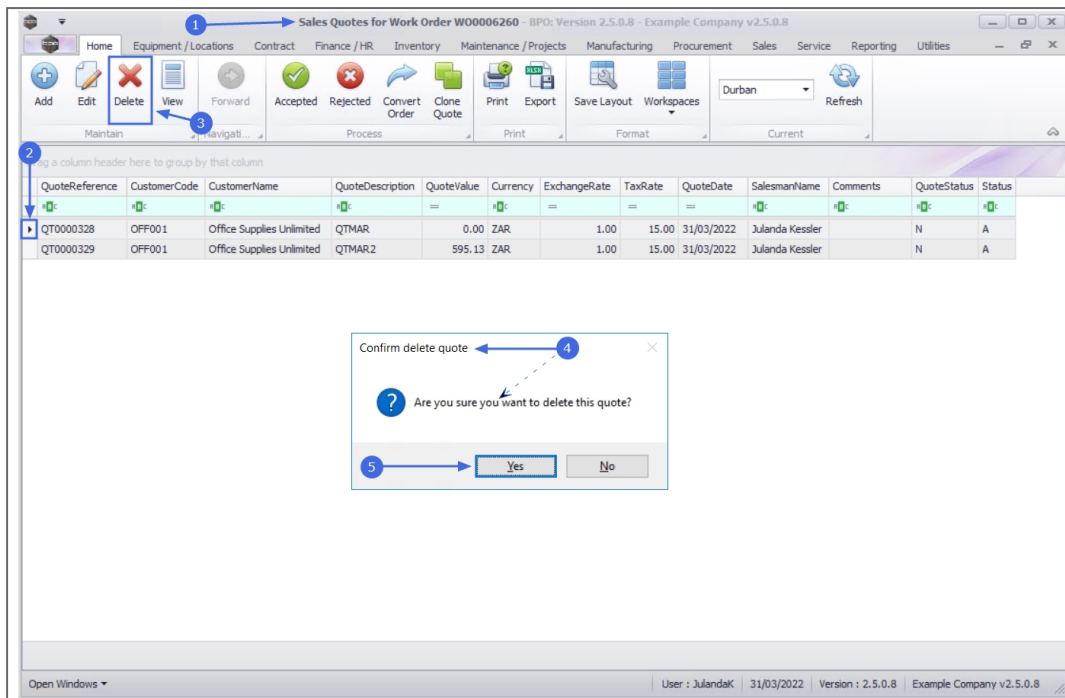
Only Quotes with a *N - New Quote* in the *Quote Status* column can be deleted.

1. From the **Sales Quotes for Work Order** [work order number] screen,
2. Click on the **row** of the Sales Quote you wish to **remove**.
3. Click on **Delete**.



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

4. When you receive the **Confirm delete quote** message to confirm;
 - **Are you sure you want to delete this quote?**
5. Click on **Yes**.

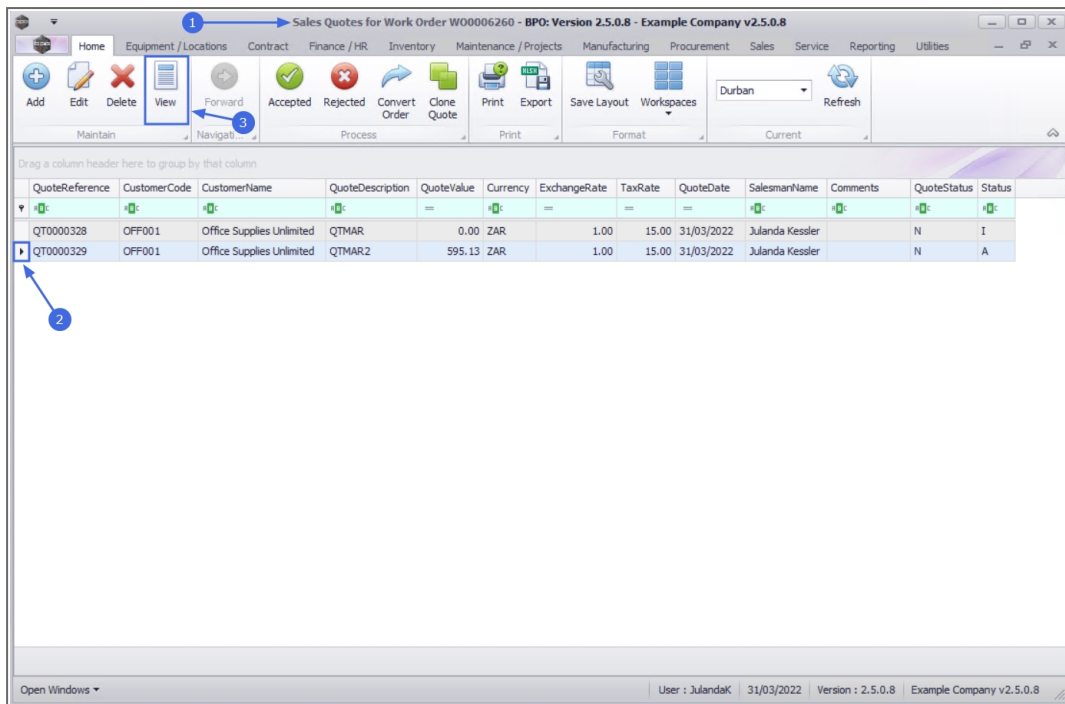


The **Status** for the Sales Quote on the **Sales Quotes for Work Order** screen has changed from **A-Active** to **I-Inactive**.

VIEW QUOTE

A Quote in any *Quote Status* can be Viewed.

1. From the **Sales Quotes for Work Order [work order number]** screen,
2. Click on the **row** of the Sales Quote you wish to **view**.
3. Click on **View**.



4. The **View Customer Quote - [quote number]** screen will display.



No changes can be made to the information on the Quote.

5. Click on **Back** to return to the **Sales Quotes for Customer** listing screen.

View Customer Quote - QT0000329 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Back Save Layout Print

Customer Name: Office Supplies Unlimited * Reference: QT0000329 * Status: New Quote * Date & Time: 31/03/2022 11:24:39 * Exchange Rate: 1.00

Contact Name: Angie Smith * Commercial: Type Class Commercial * Salesman: Julanda Kessler * Currency: South African Rand * Tax Rate: 15.00

RefType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	WO0006260
QUOT	Sales Quote	
ASMN	Serial No	1912-102035
CALL	Call Reference	
CTRT	Contract No	
PMNG	Project Reference	

SuppressOnPrint	QuoteItemType	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCo
No	INVN	500-147K	SP500 Black Toner	Main Warehouse	1.000	0.000		450.000	15.000	0.000	517.500	

Comment

Sub Total: 517.50
VAT: 77.63
Grand Total: 595.13

User: JulandaK | 31/03/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

FORWARD NAVIGATION

The *Forward* navigation button is only available in the *Invoiced Quote* status after the Sales Quote has been Converted to Order.

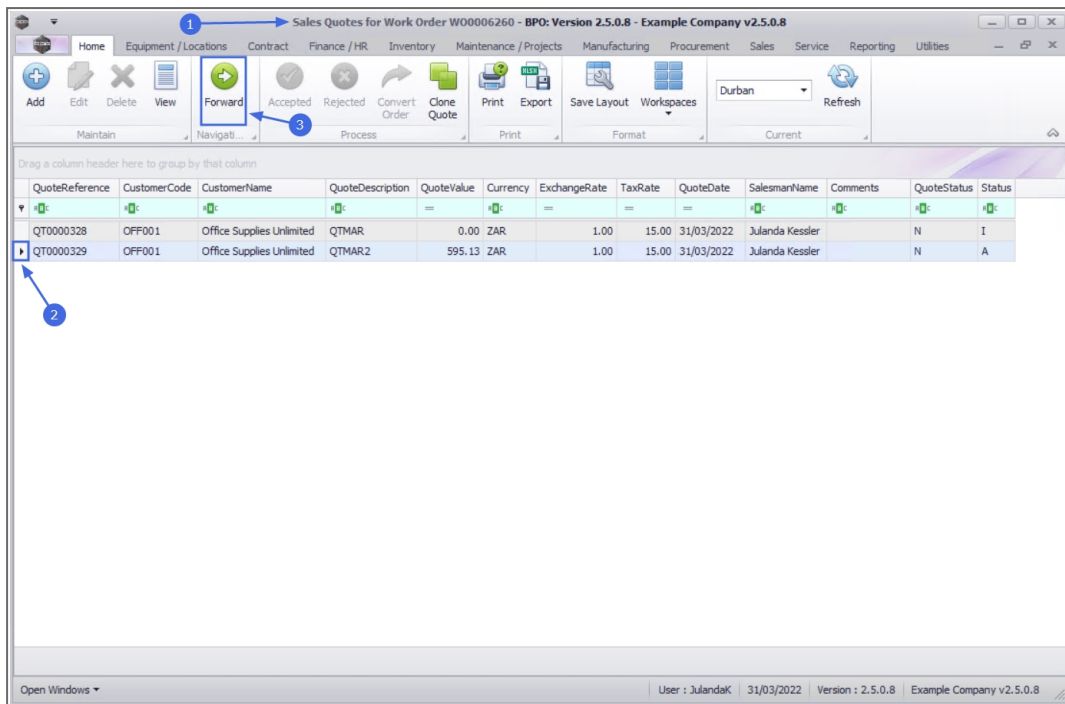
This feature enables the user to quickly navigate to related documentation.

You can navigate to the Sales Orders listing screen where you can view the Sales Order that has been created for the selected Sales Quote.

1. From the **Sales Quotes for Work Order** screen,
2. Click on the **row** of the Invoiced Quote you wish to view.
3. Click on **Forward** to navigate to the Sales Orders listing screen.



If the Forward navigation is available (not greyed out) then further downstream process documents related to the selected order is available and you can thus navigate to those downstream documents, e.g. the linked **Sales Invoice**, the new deal **Call** or **Project**.



Sales Quotes for Work Order W00006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000328	OFF001	Office Supplies Unlimited	QTMAR	0.00	ZAR	1.00	15.00	31/03/2022	Julanda Kessler		N	I
QT0000329	OFF001	Office Supplies Unlimited	QTMAR2	595.13	ZAR	1.00	15.00	31/03/2022	Julanda Kessler		N	A

User : JulandaK | 31/03/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

BACK NAVIGATION

- The **Back** navigation button is available and by clicking on it, you can navigate back until you return to the **Sales Quotes** listing screen.

Sales Orders - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Add Edit Delete View Back Forward Create Invoice Create New Deal Add Items to WO New Deal Project Save Layout Workspaces Print Sales Order Print Proforma Invoice Export Durban Refresh

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	Dep
OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:48:13		
OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:50:21		
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:51:52		
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:58:22		
OR0000286	BEA001	Bearing and Shoe	New order	quotereffest	0.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:59:34		
OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	05:06:46		
OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
OR0000304	OFF001	Office Supplies Unlimit...	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
OR0000308	TIA001	Titan Group	New order	MRTesT	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
OR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
OR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
OR0000321	DAN002	Dancing Shoes	New order	SO/100	1,144.25	ZAR	10/03/2021	Abigail Milne	1.00	15.00	22:46:29		
OR0000326	BIG0001	Big Bargains	New order	BB0004	4,566.42	ZAR	29/09/2021	Julanda Kessler	1.00	15.00	14:22:52		
OR0000334	OFF001	Office Supplies Unlimit...	New order	QTMAR2	595.13	ZAR	31/03/2022	Julanda Kessler	1.00	15.00	12:11:22		

Open Windows User: JulandaK 31/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

ACCEPT QUOTE

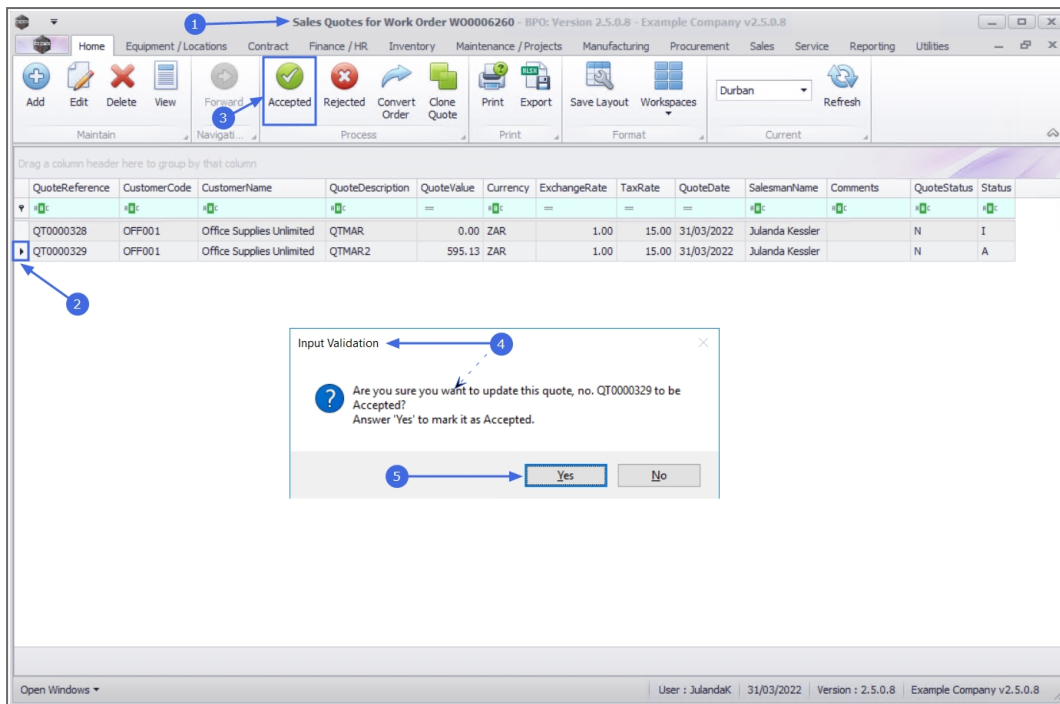
Only quotes with a *N* - *New Quote* in the *Quote Status* can be Accepted.

1. From the *Sales Quotes for Work Order [work order number]* screen,
2. Click on the **row** of the Sales Quote you wish to **accept**.
3. Click on **Accepted**.



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

4. When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to update this quote, no. [quote number] to be Accepted? Answer 'Yes' to mark it as Accepted.**
5. Click on **Yes**.



The Quote Status for the selected Quote has changed to **[A] - Accepted** on the **Sales Quotes for Customer** listing Screen.

REJECT QUOTE

A quote can be rejected from the **Sales Quotes for Customer** listing screen where the Quote Status is set to **[N] - New Quote** or **[A] - Accepted**.

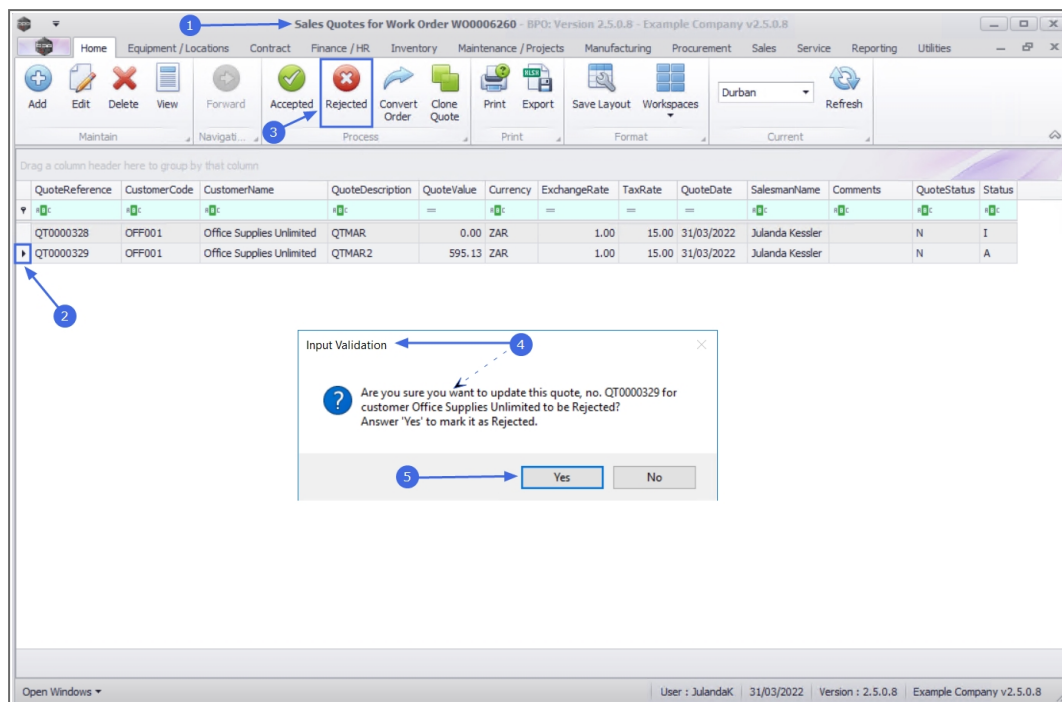
1. From the **Sales Quotes for Work Order [work order number]** screen,
2. Click on the **row** of the Sales Quote that needs to be **rejected**.
3. Click on **Rejected**.



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

4. When you receive the **Input Validation** screen to confirm;
 - **Are you sure you want to update this quote, no. [quote number] to be Rejected? Answer 'Yes' to mark it as Rejected.**

5. Click on **Yes**.



The Quote Status for the selected Quote has changed to **[R] - Rejected** on the **Sales Quotes for Customer** listing Screen.

CONVERT QUOTE TO ORDER

A quote can be converted to a sales order from the **Sales Quotes for Customer** listing screen where the Quote Status is set to **[N] - New Quote** or **[A] - Accepted**.

1. From the **Sales Quotes for Project [project ref number]** screen,
2. Click on the **row** of the Sales Quote that you wish to **convert** to a sales order.
3. Click on **Convert Order**.

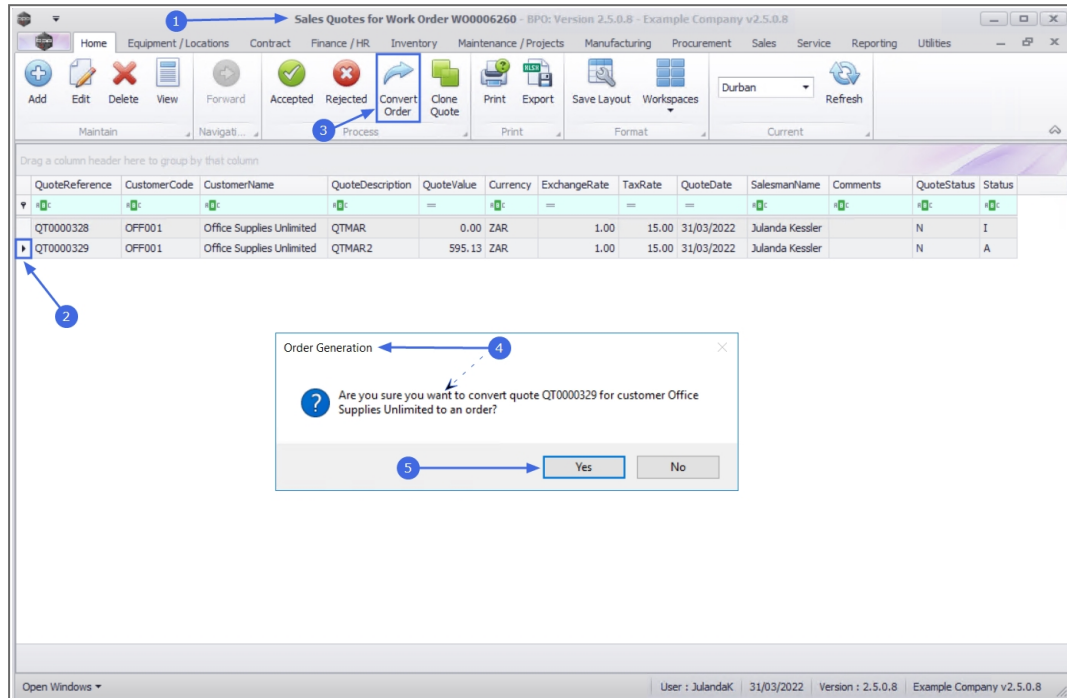


Short cut key: **Right click** to display the **All groups** menu list. Click on **Order**.

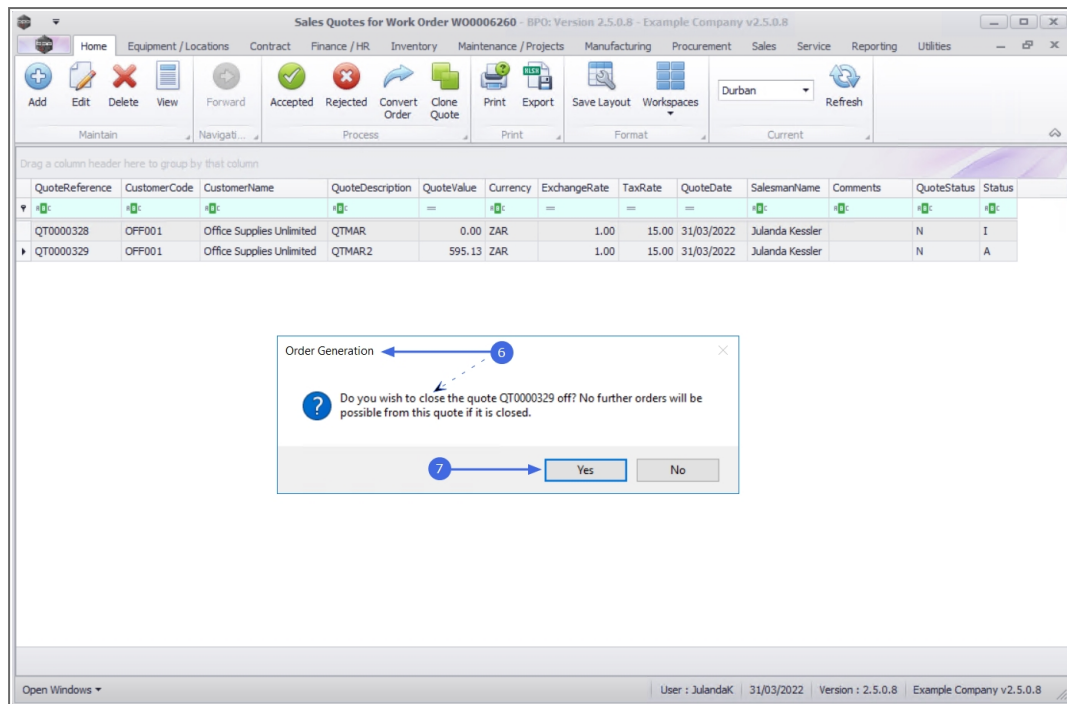


You will receive **three (3)** prompt messages to confirm the transaction:

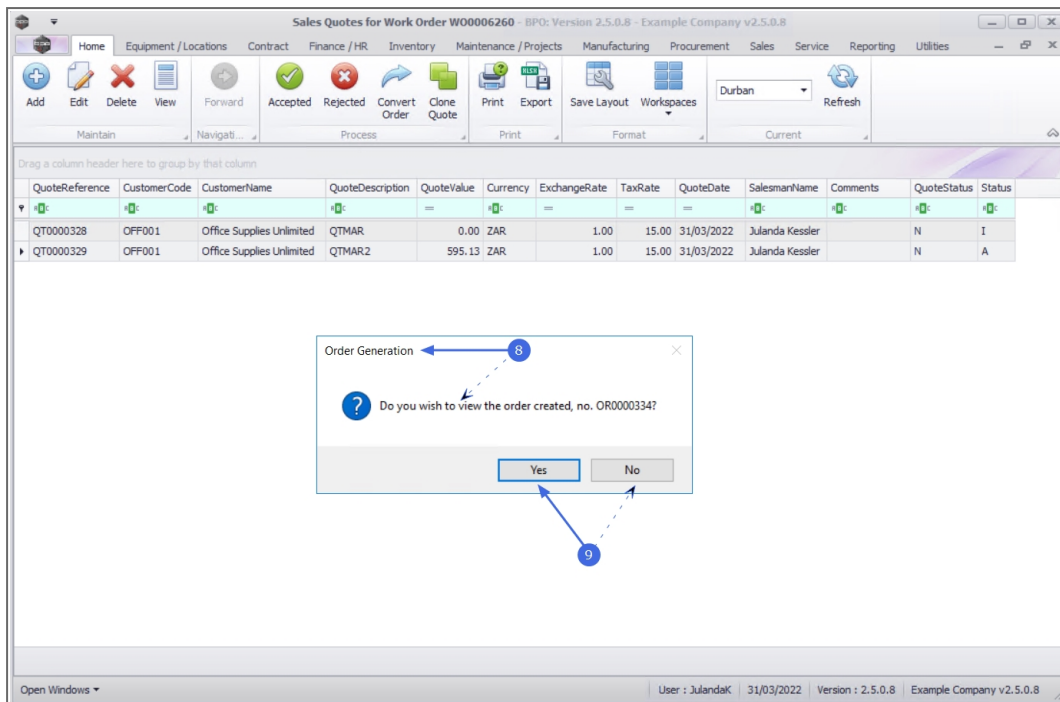
4. When you receive the first **Order Generation** message to confirm;
 - ***Are you sure you want to convert quote [quote number], for Customer [customer name] to an order?***
5. Click on **Yes**.



6. The second **Order Generation** message will confirmation;
 - ***Do you wish to close the quote [quote number] off? No further orders will be possible from this quote if it is closed.***
7. Click on **Yes**.



8. The third **Order Generation** message will confirm;
 - **Do you wish to view the order created, no. [order number]?**
9. Click **Yes** to view the order.
 - Selecting **No** will leave you on the **Sales Quotes for Customer** screen.



The **Sales Orders** listing screen will display the a list of all **New Orders** for the **Site** you have selected.



For a detailed handling of this topic refer to [Quotes - Convert to Sales Order](#)

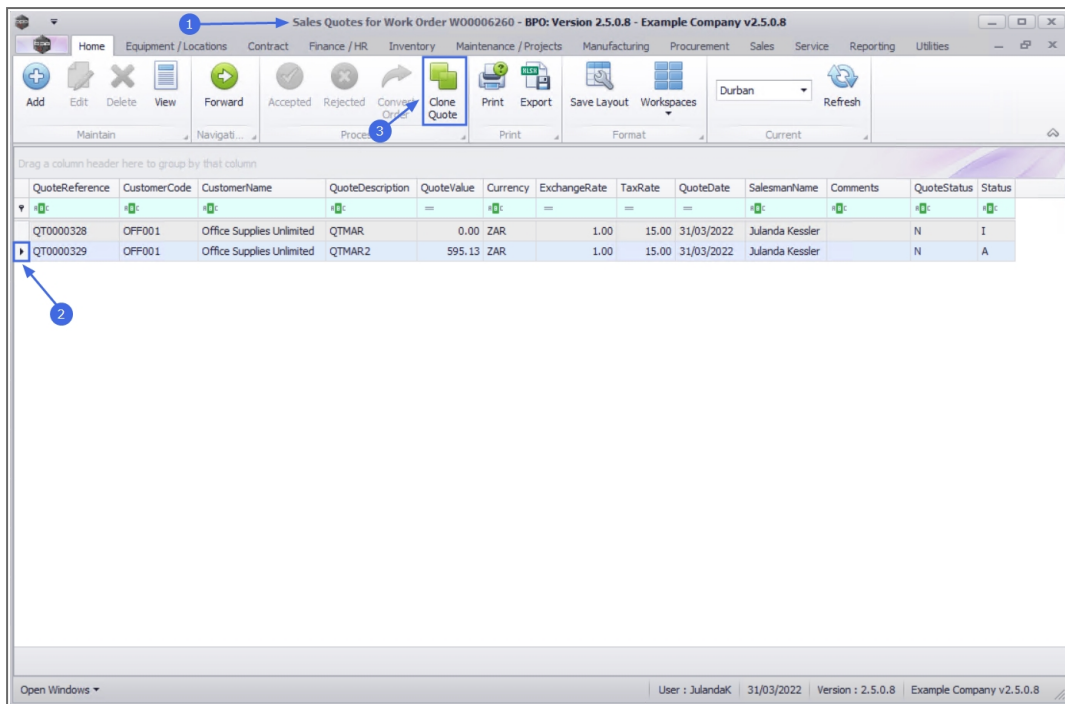
CLONE A QUOTE

The nature of cloning a quote is to **save time** when creating new quotes for customers. Using this method, ensures that most of the details of the quote would remain the same. You may wish to **edit** some of the details, for example, the customer, the discount amount or **add** items such as a warranty to the quote.

1. From the **Sales Quotes for Work Order [work order number]** screen,
2. Select the **row** of the quote you wish to clone.
3. Click on **Clone Quote**.



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



4. The **Add new Customer Quote** screen will display.



It is important that a new **Reference** is entered as it is used to find and identify the quote once it has been processed.

5. You can edit any of the **Customer Heading**, **Financial Heading** or **Cross Reference** details, if required.
6. Edit the **Line Item details**, if required.
7. You can also choose to apply a [Quotes - Apply Sales Template](#), which will be appended to the existing quote items, as well as [Quotes - Apply Project Methodology](#) to the cloned quote, if required.



For a detailed handling of this topic refer to [Quotes - Clone a Quote](#)

8. Click on **Save** when done.

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

8 → Save

7 → Maintain

Customer Name: Office Supplies Unlimited
 Contact Name: Angie Smith
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Currency: South African Rand
 Tax Rate: 15.00

Reference: QTMAR2
 Status: New Quote
 Date & Time: 31/03/2022 12:18:54
 Exchange Rate: 1.00

RefType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	
QUOT	Sales Quote	
ASMN	Serial No	
CALL	Call Reference	
CTRT	Contract No	
PMNG	Project Reference	

SuppressOnPrint	QuoteItem Type	ItemCode	QuoteItemDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	ItemPrice	BaseCo
	Parts	500-147K	SP500 Black Toner	Main Warehouse	1.000	0.000		450.000	15.000	0.000	517.500	
	Select type...											

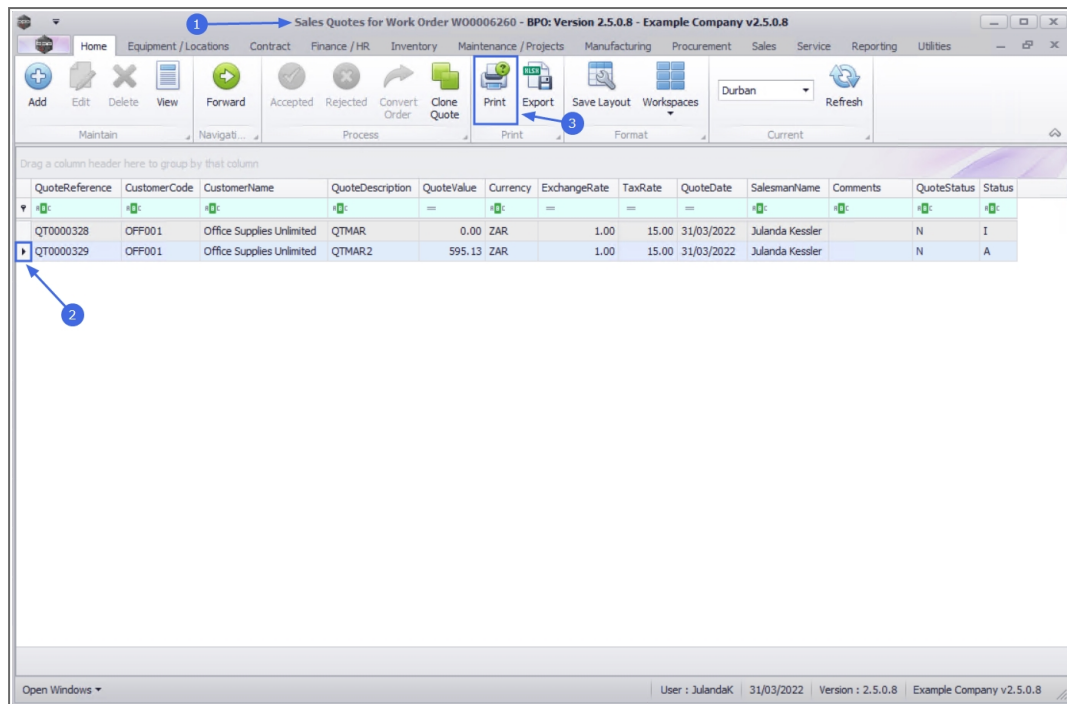
Comment

Sub Total: 517.50
 VAT: 77.63
 Grand Total: 595.13

User: JulandaK | 31/03/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

PRINT QUOTE

1. From the **Sales Quotes for Work Order [work order number]** screen,
2. Click on the **row** of the Quote you wish to print.
3. Click on **Print**.



4. The **Select the option as desired** message screen will display with the following options;

-  **Print Quote** will open the Sales Quote in the Preview screen to view, print, export or email.
-  **Email Quote** will allow you to add recipients and the system will create a .PDF of the Sales Quote as an Attachment to the email.
-  **Print and Email Quote** will display both the Report Preview and Email screens.

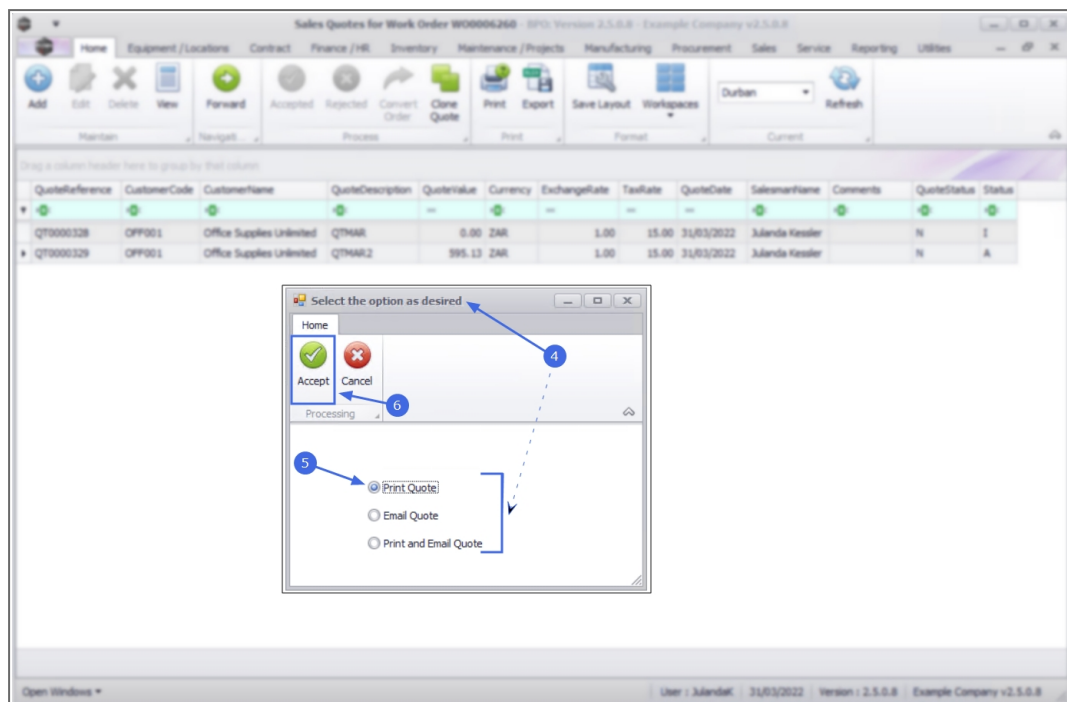
5. Click on the **radio button** of the option you require.



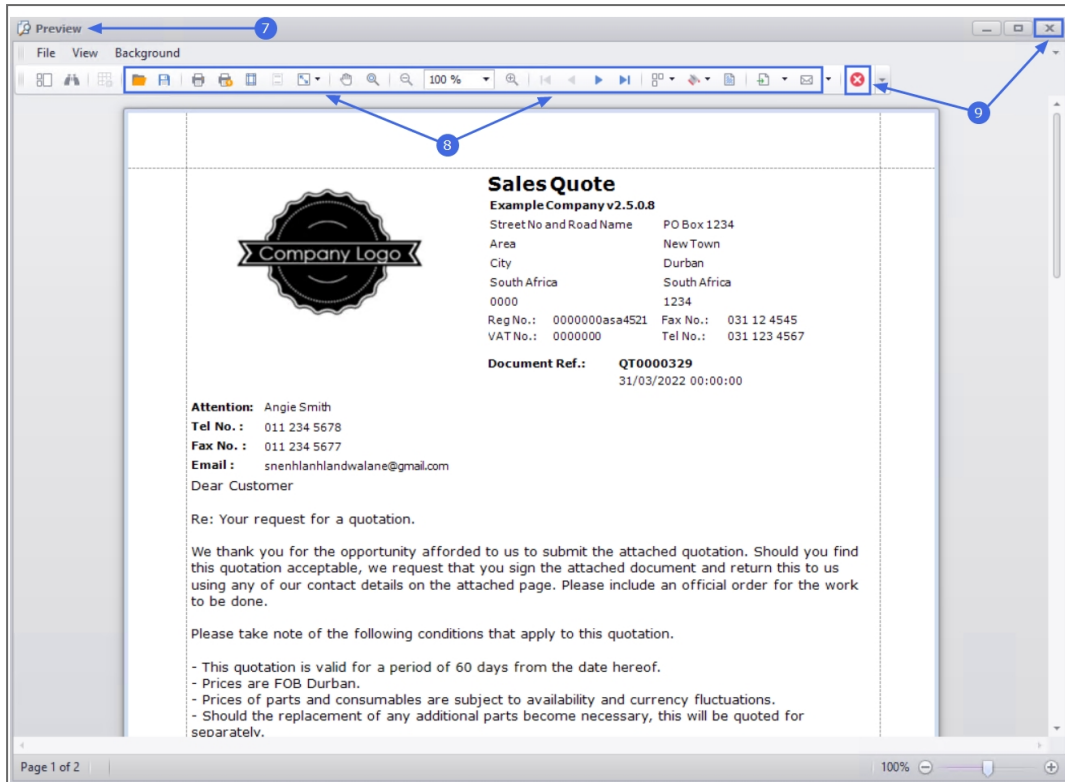
When selecting to **Email the Quote**, the quote will be emailed via the **BPO Email Service** on the server (not from MS Outlook).

- The example has **Print Quote** selected.

6. Click on **Accept**.



7. The Sales Quote will display in the **Preview** screen.
8. From this screen you can make cosmetic changes to the document, as well as **Save**, **Print**, **Export**, **Add a Watermark** or **Email** the Sales Quote.
9. Click **Close** to return to the **Sales Quotes for Work Order** screen.



MNU.072.025

