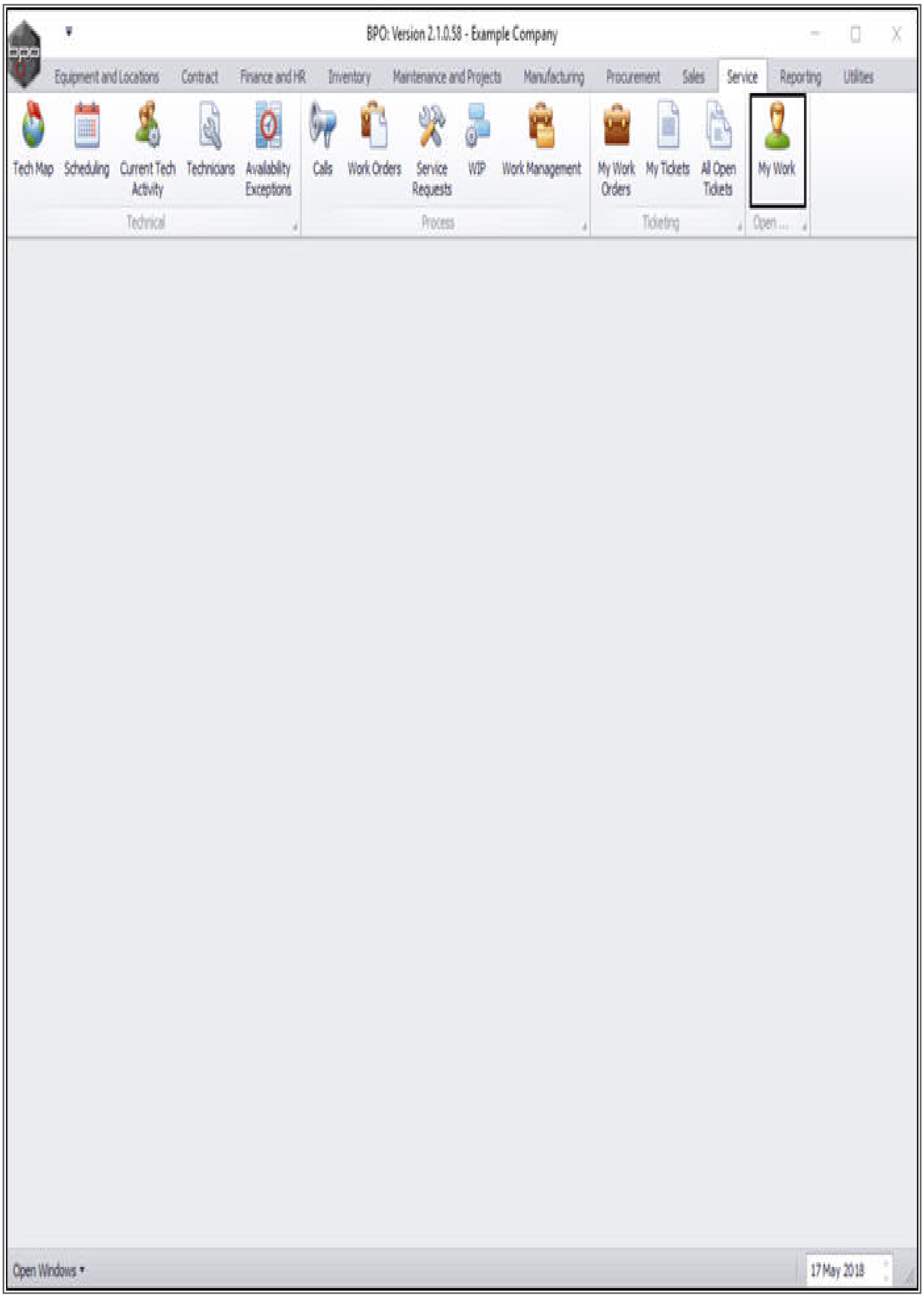
SERVICE

MY WORK - 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.

When using the **Email** option to send a Sales Quote, please note that it will be mailed via the **BPO Email Service** on the server (not from your own MS Outlook).

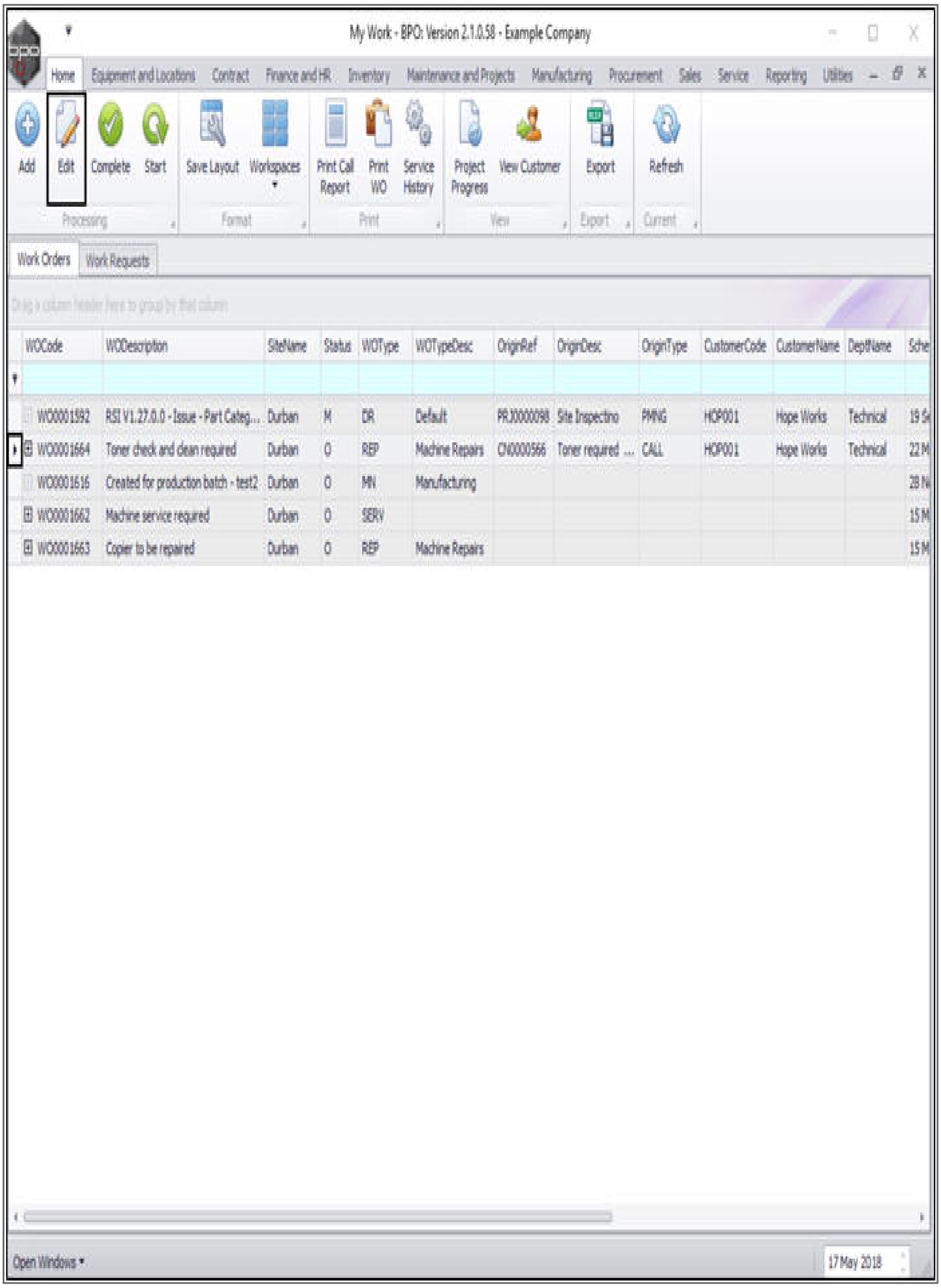
***Ribbon Access:** Service > My Work*



The ***My Work*** listing screen will be displayed.

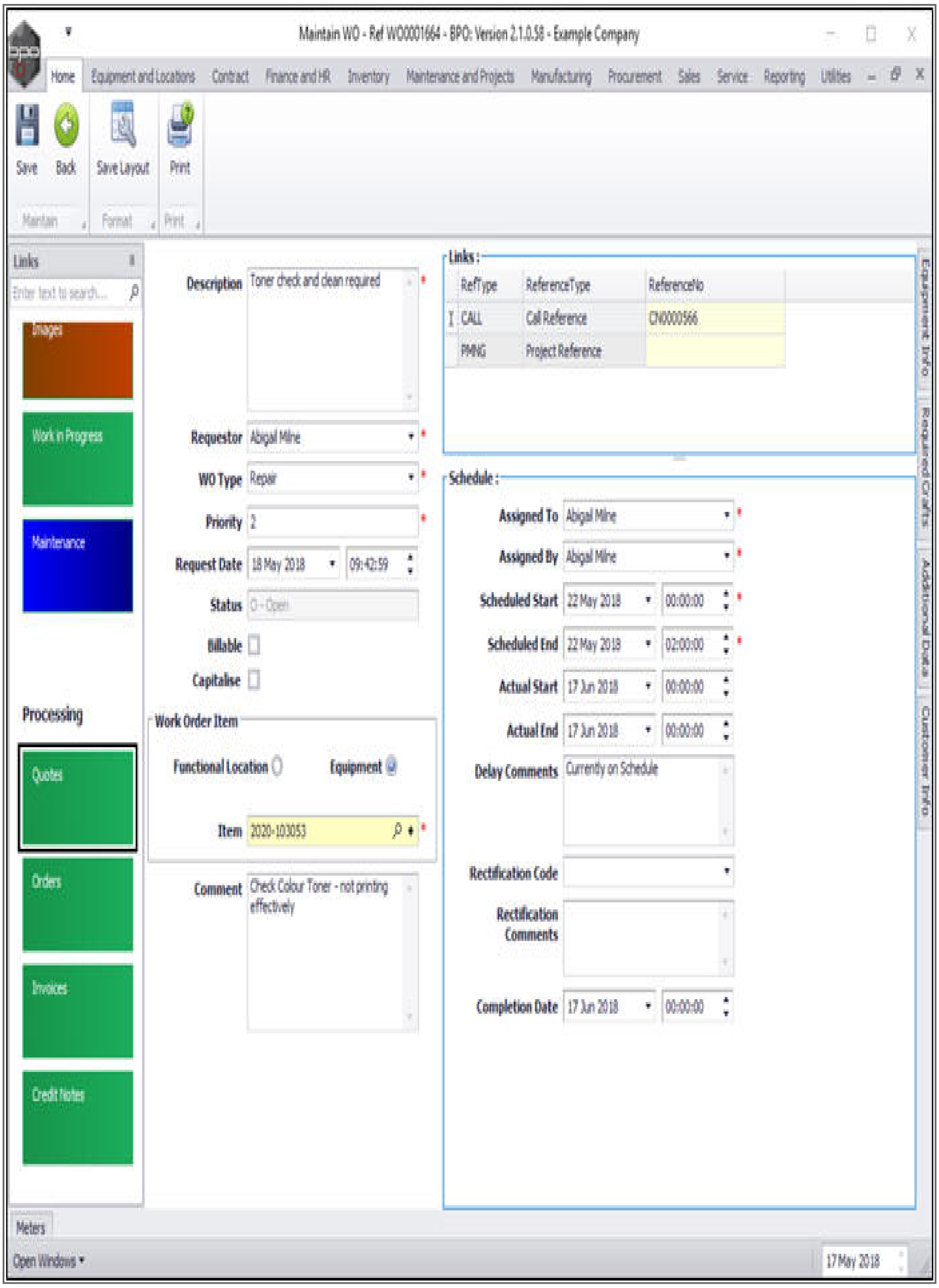
ADD A QUOTE

- Click on the ***row selector*** in front of the ***work order*** where you wish to ***raise a quote***.
- Click on ***Edit***.



The ***Maintain WO - Ref [ ]*** screen will be displayed.

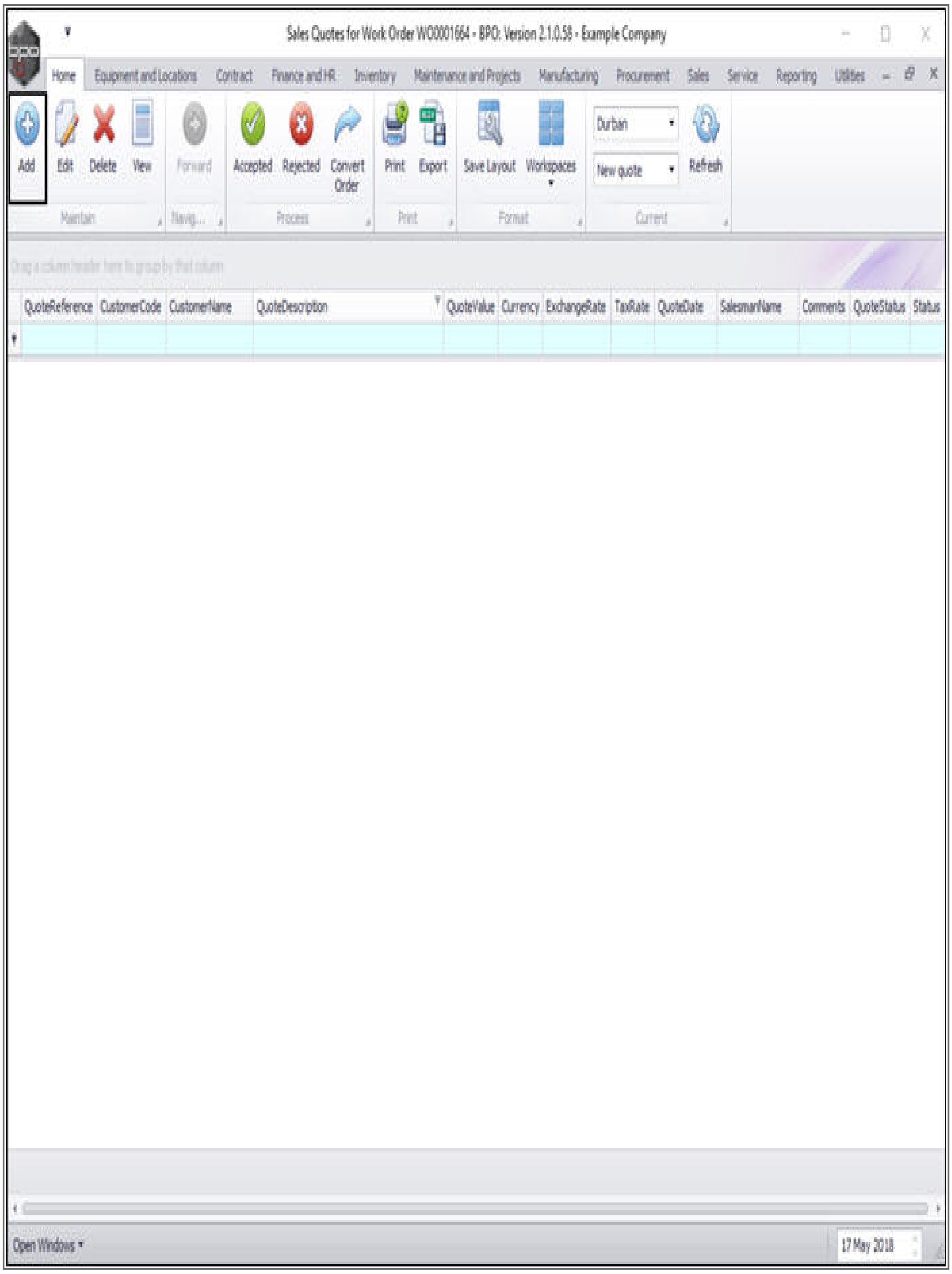
- Click on the ***Quotes*** tile.



The ***Sales Quotes for Work Order [ ]*** listing screen will be displayed.

If there were already sales quotes linked to this work order, they would be listed here.

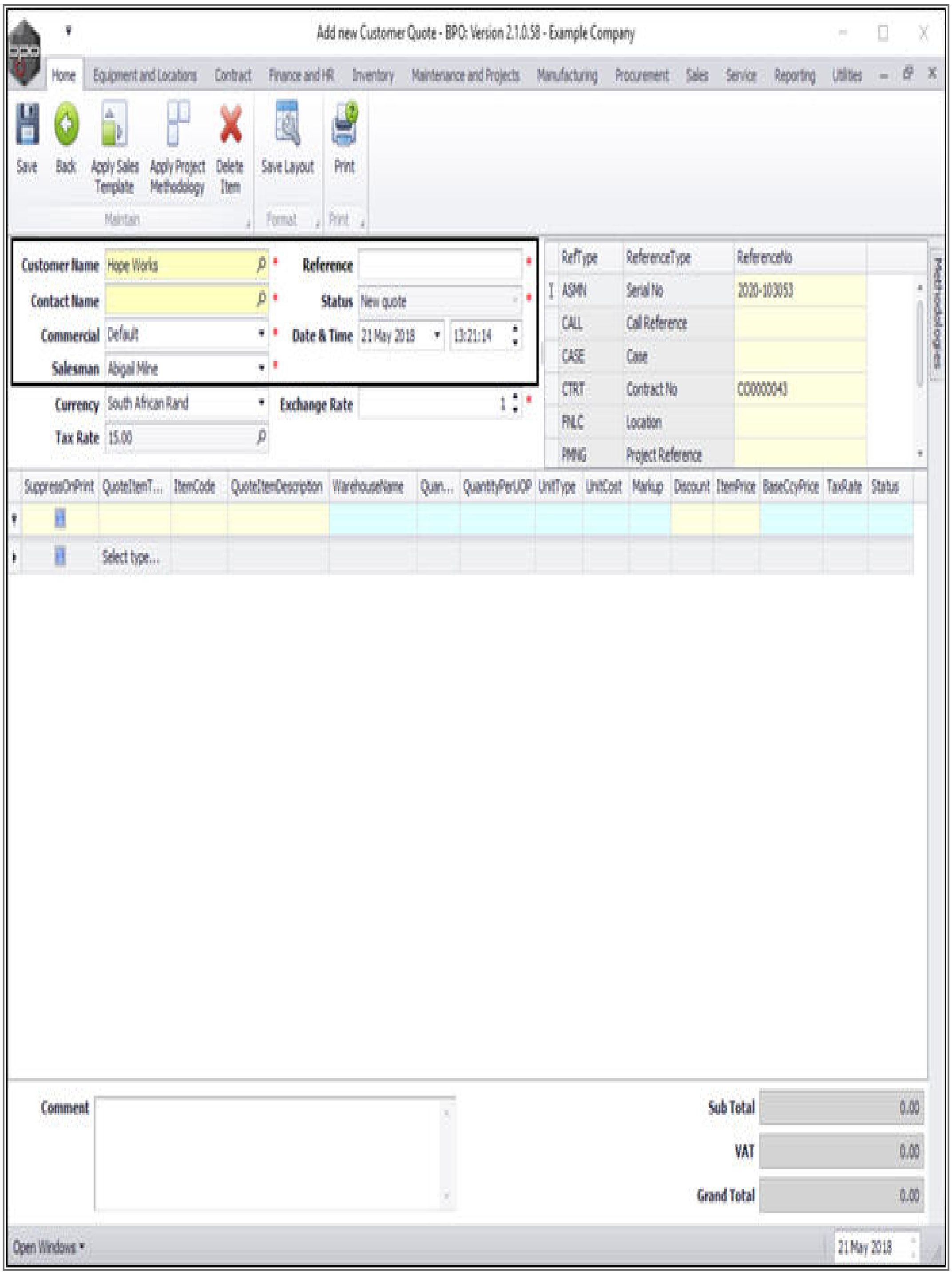
- Click on ***Add***.



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

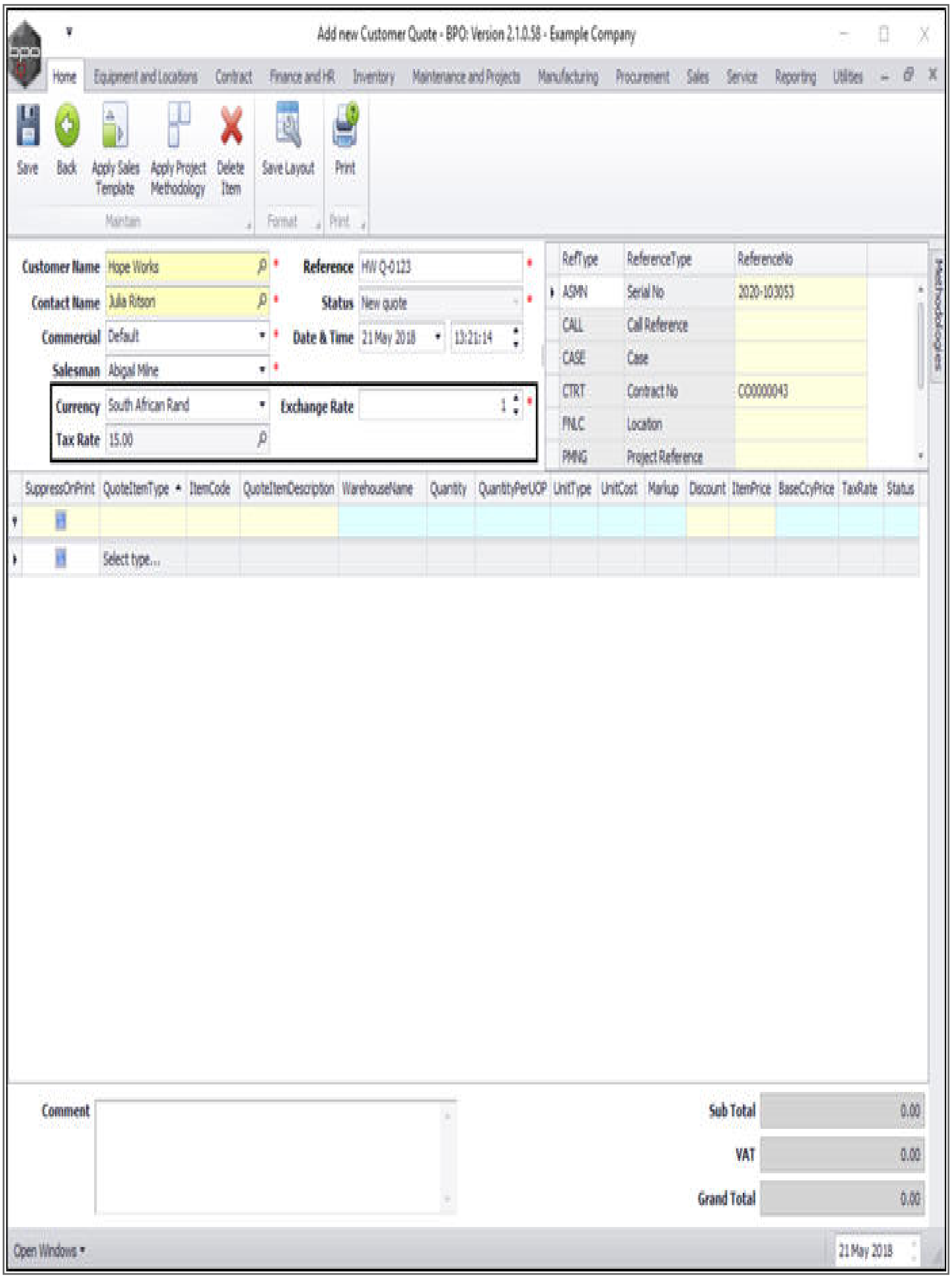
QUOTE HEADER DETAILS

- **Customer Name:** This will auto populate with the name of the customer linked to this work order.
- **Contact Name:** Click on the search button and select a contact from the ***Select a contact for this quote*** pop up screen.
- **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 logged on to the system 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 and time.
    - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
    - **Time:** You can either type in or use the arrow indicators to select an alternative time if required.



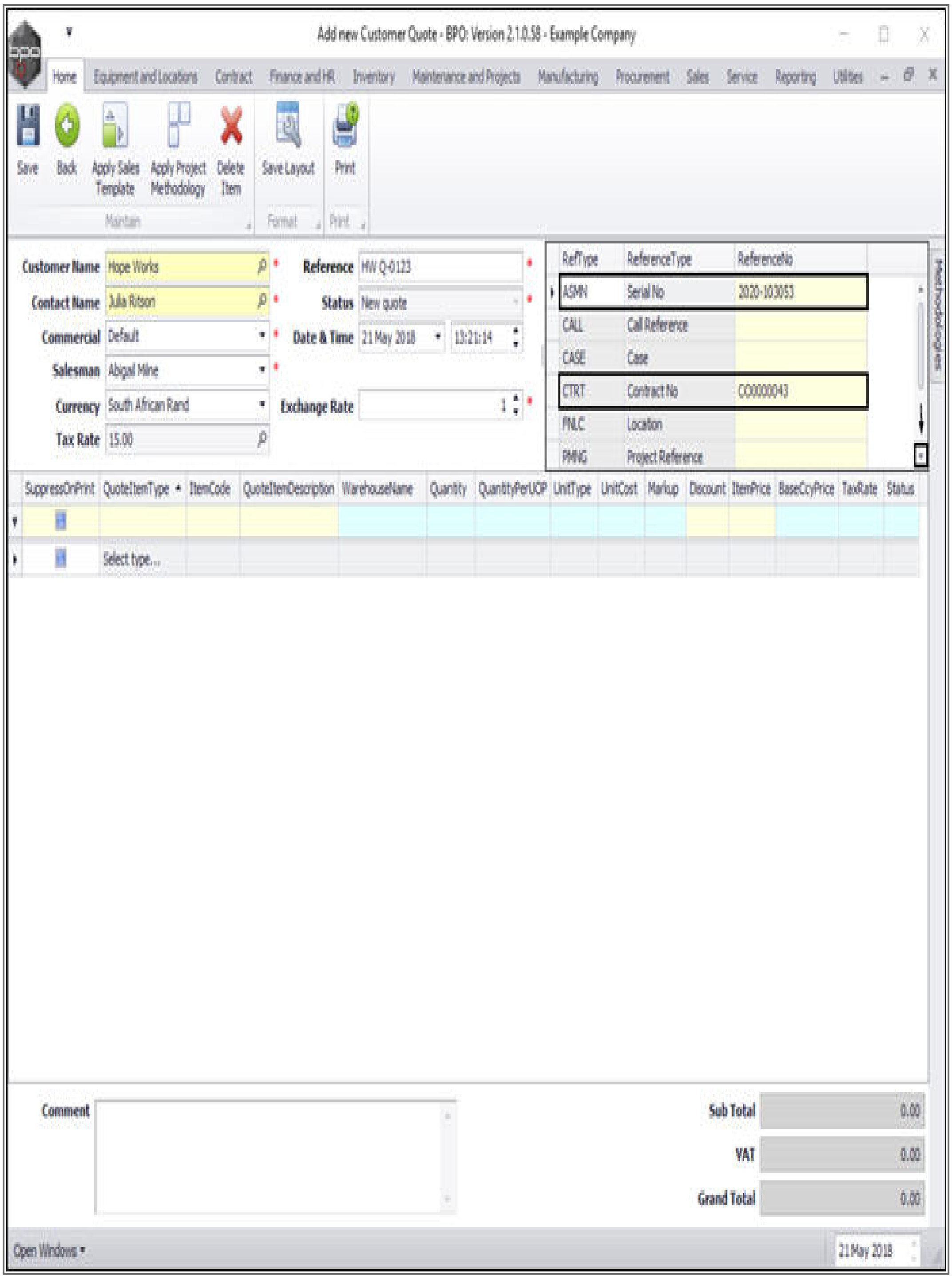
QUOTE FINANCIAL DETAILS

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

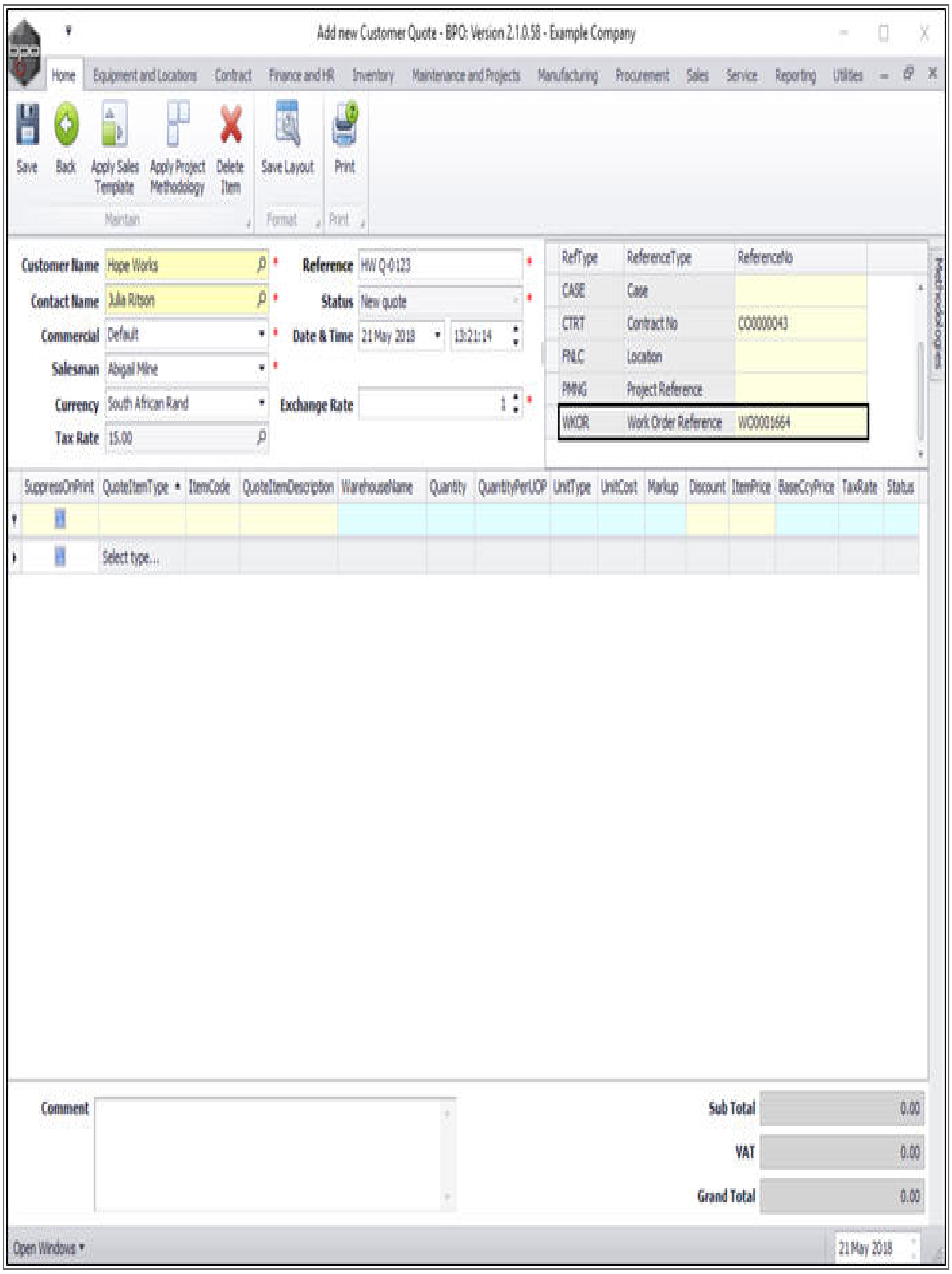

Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Apply Sales Template
Apply Project Methodology
Delete Item
Save Layout
Print
Maintain
Format
Print
Customer Name
Hope Works
Reference
HW Q-0123
Contact Name
Julia Ritson
Status
New quote
Commercial
Default
Date & Time
21 May 2018
13:21:14
Salesman
Abigail Mine
Currency
South African Rand
Exchange Rate
1
Tax Rate
15.00
RefType
ReferenceType
ReferenceNo
ASMN
Serial No
2020-103053
CALL
Call Reference
CASE
Case
CTRT
Contract No
CO0000043
FNLC
Location
PMNG
Project Reference
Methodologies
SuppressOnPrint
QuoteItemType
ItemCode
QuoteItemDescription
WarehouseName
Quantity
QuantityPerUOP
UnitType
UnitCost
Markup
Discount
ItemPrice
BaseCcyPrice
TaxRate
Status
Select type...
Comment
Sub Total
0.00
VAT
0.00
Grand Total
0.00
Open Windows
21 May 2018

CROSS REFERENCE INFORMATION

- In the ***References*** frame you can see that this quote is linked to a ***Serial Number*** and a ***Contract Number***.
- ***Scroll down*** in this References frame.



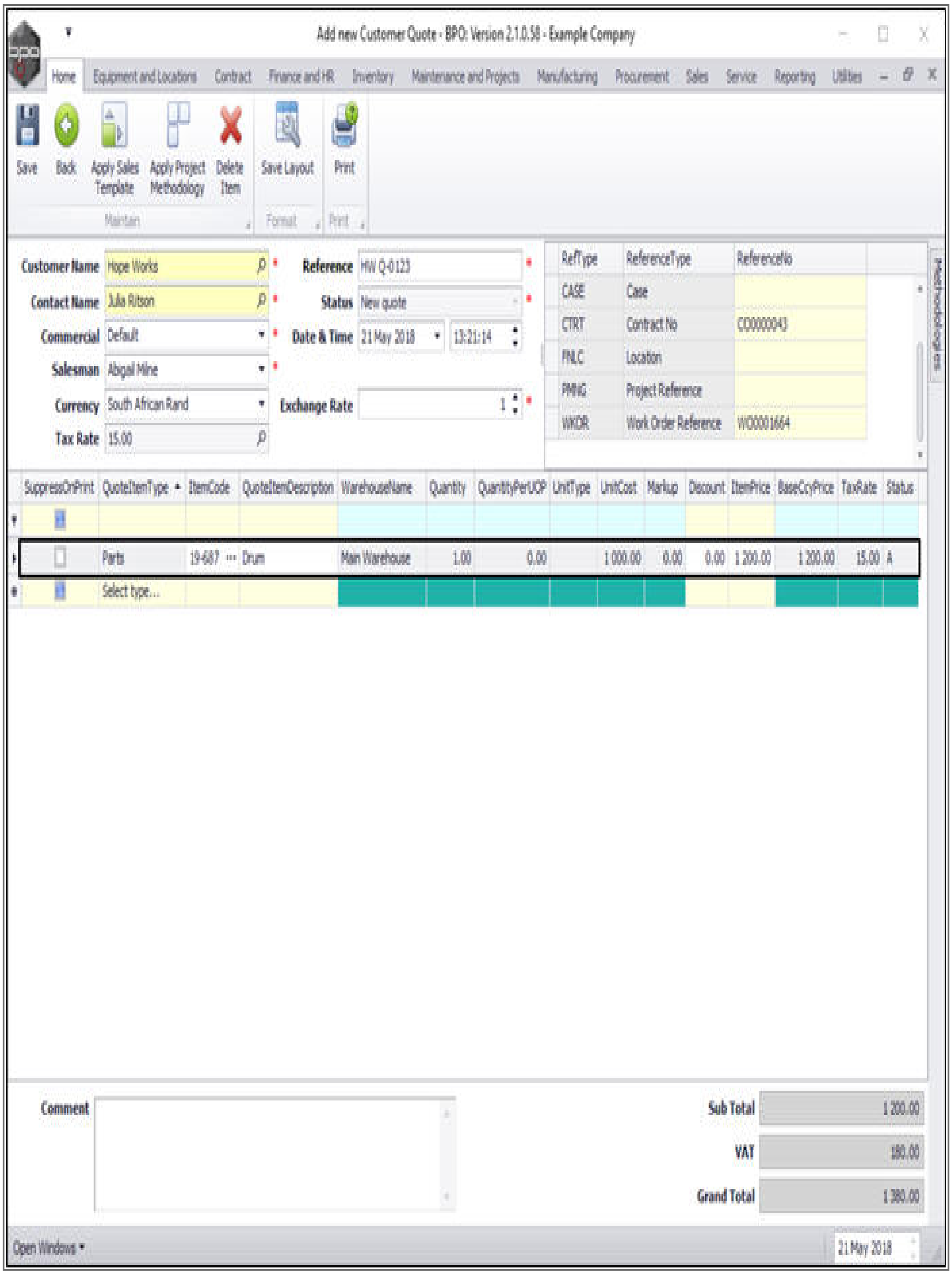
- You can now view the linked ***work order number*** that you initially selected when you began this ***'raise a quote'*** process.



Add new Customer Quote - BPO: Version 2.1.0.58 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Apply Sales Template
Apply Project Methodology
Delete Item
Save Layout
Print
Maintain
Format
Print
Customer Name
Hope Works
Contact Name
Julia Ritson
Commercial
Default
Salesman
Abigail Mline
Currency
South African Rand
Tax Rate
15.00
Reference
HW Q-0123
Status
New quote
Date & Time
21 May 2018
13:21:14
Exchange Rate
RefType
ReferenceType
ReferenceNo
CASE
Case
CTRT
Contract No
CO0000043
F&LC
Location
PMNG
Project Reference
WKOR
Work Order Reference
WO0001664
Methodologies
SuppressOnPrint
QuoteItemType
ItemCode
QuoteItemDescription
WarehouseName
Quantity
QuantityPerUOP
UnitType
UnitCost
Markup
Discount
ItemPrice
BaseCcyPrice
TaxRate
Status
Select type...
Comment
Sub Total
VAT
Grand Total
0.00
0.00
0.00
Open Windows
21 May 2018

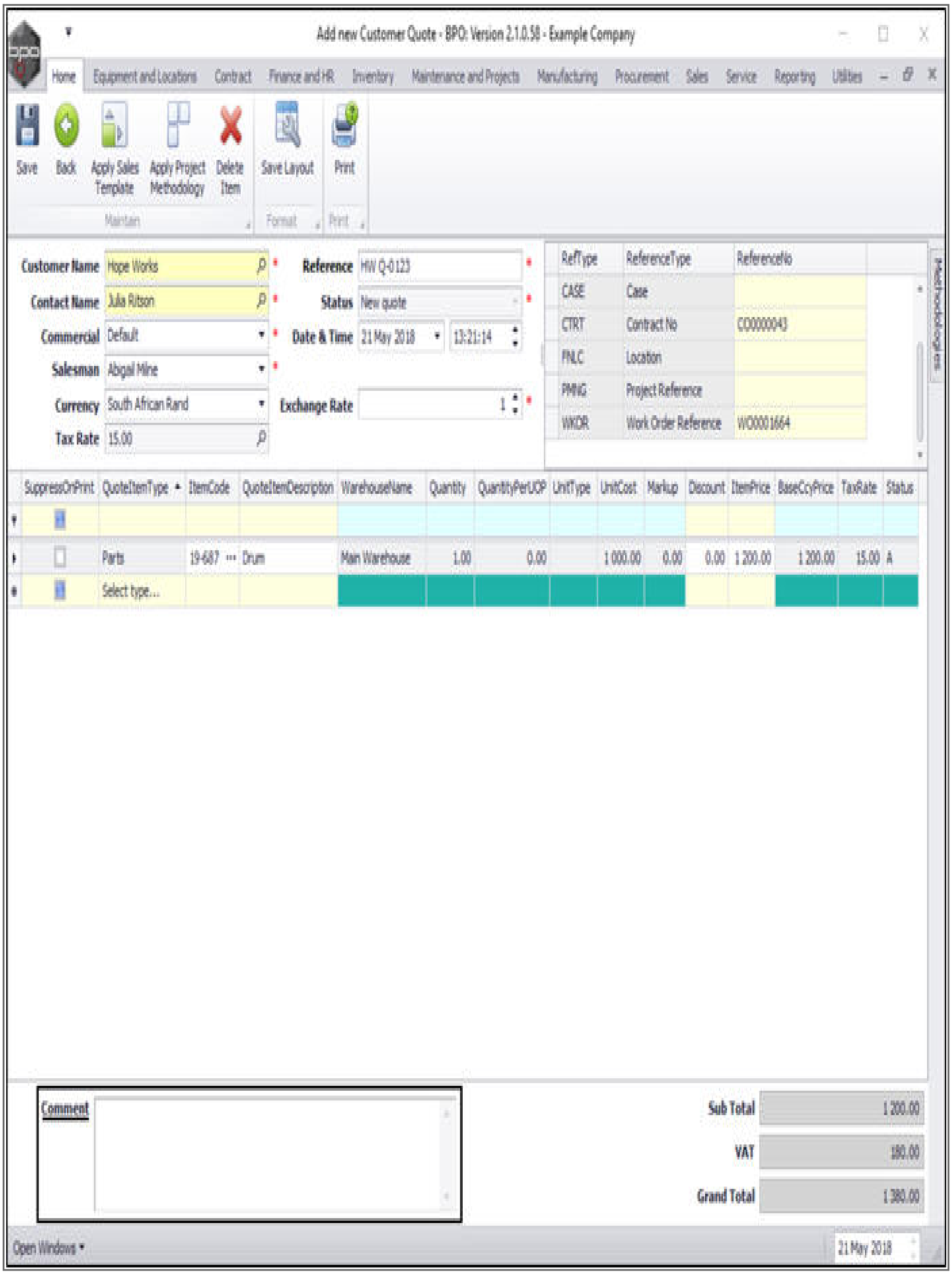
ADD QUOTE ITEM DETAILS

- Follow the process in Add New Customer Quote to add the quote item details as required.



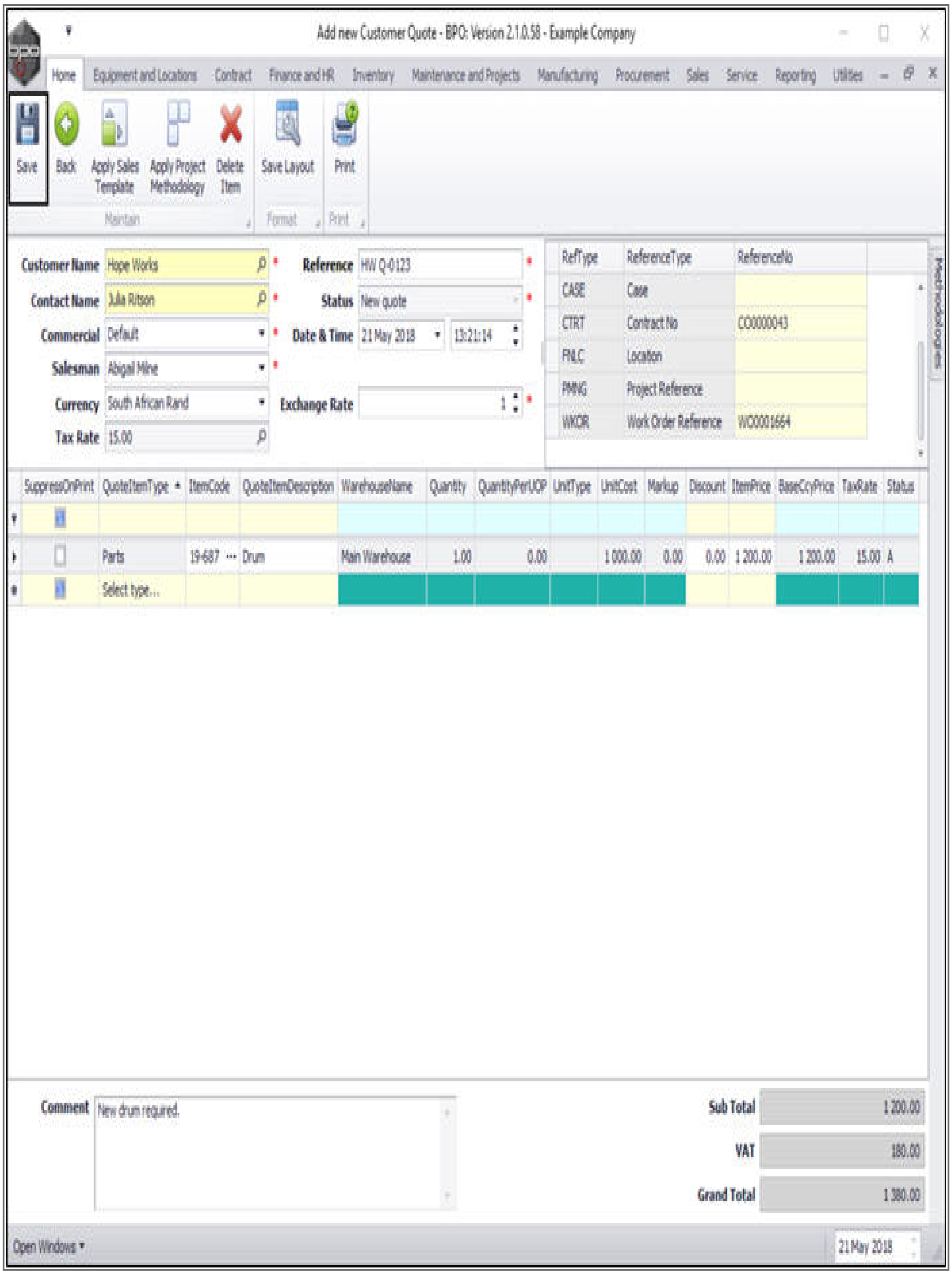
COMMENTS

- Click in this text box and type in a ***comment*** for this quote. This comment will appear on the ***quote document***.

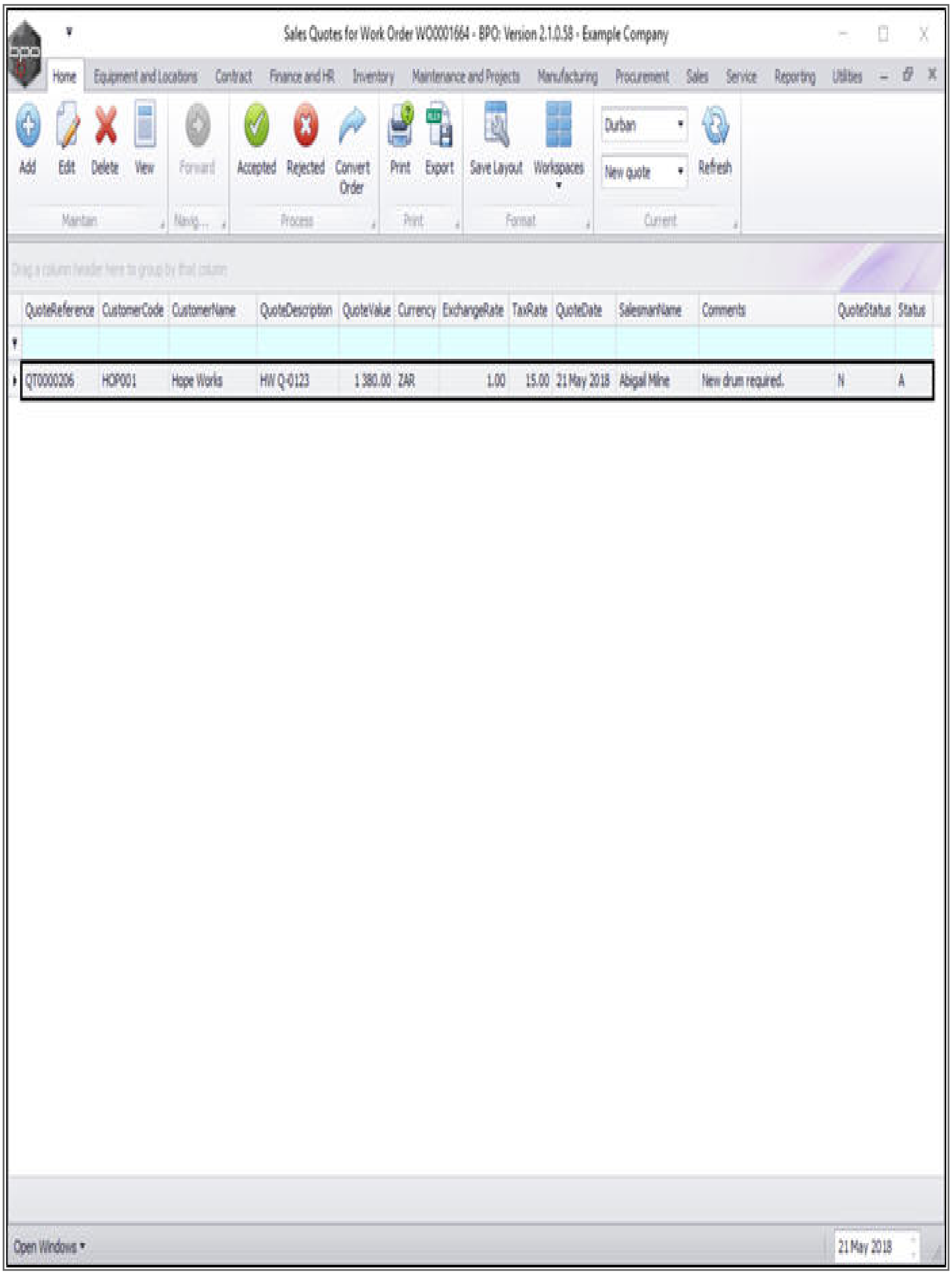


SAVE QUOTE

- When you have finished adding the quote details, click on ***Save***.



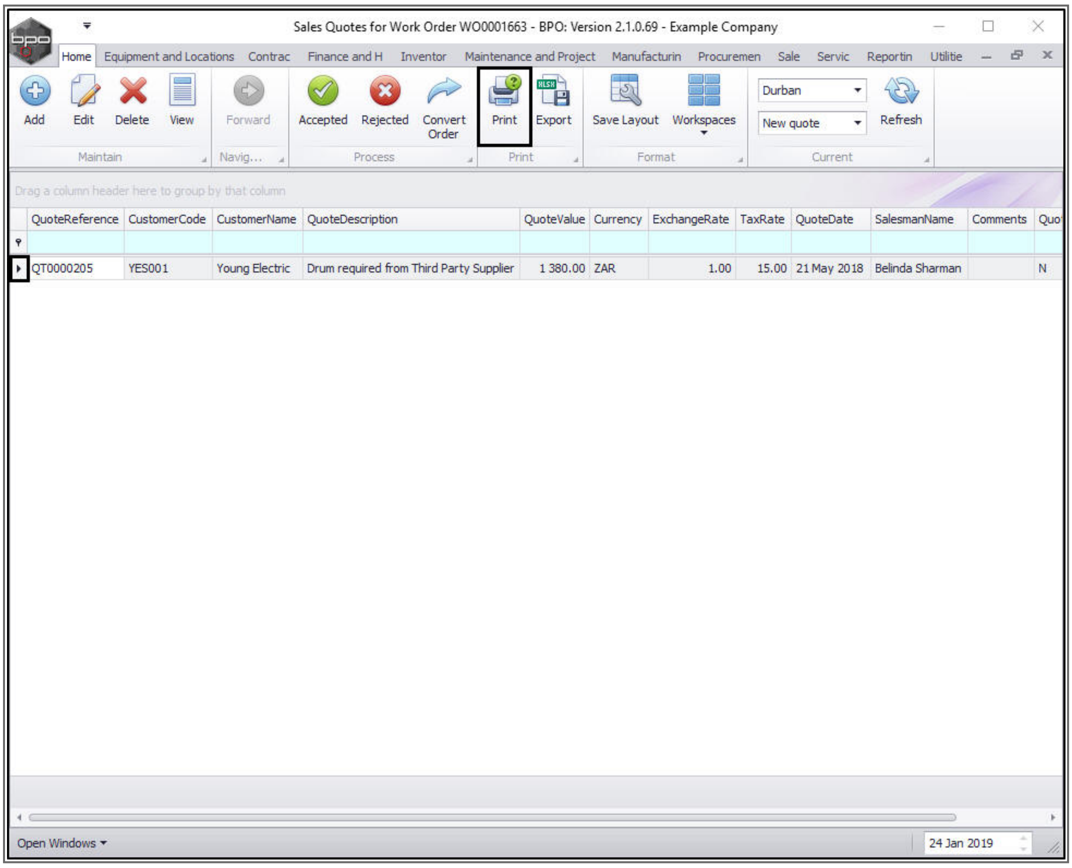
- The new customer quote information will be ***saved*** and you will return to the ***Sales Quotes for Work Order [ ]*** listing screen.
- Here you can now view the newly created sales quote details.



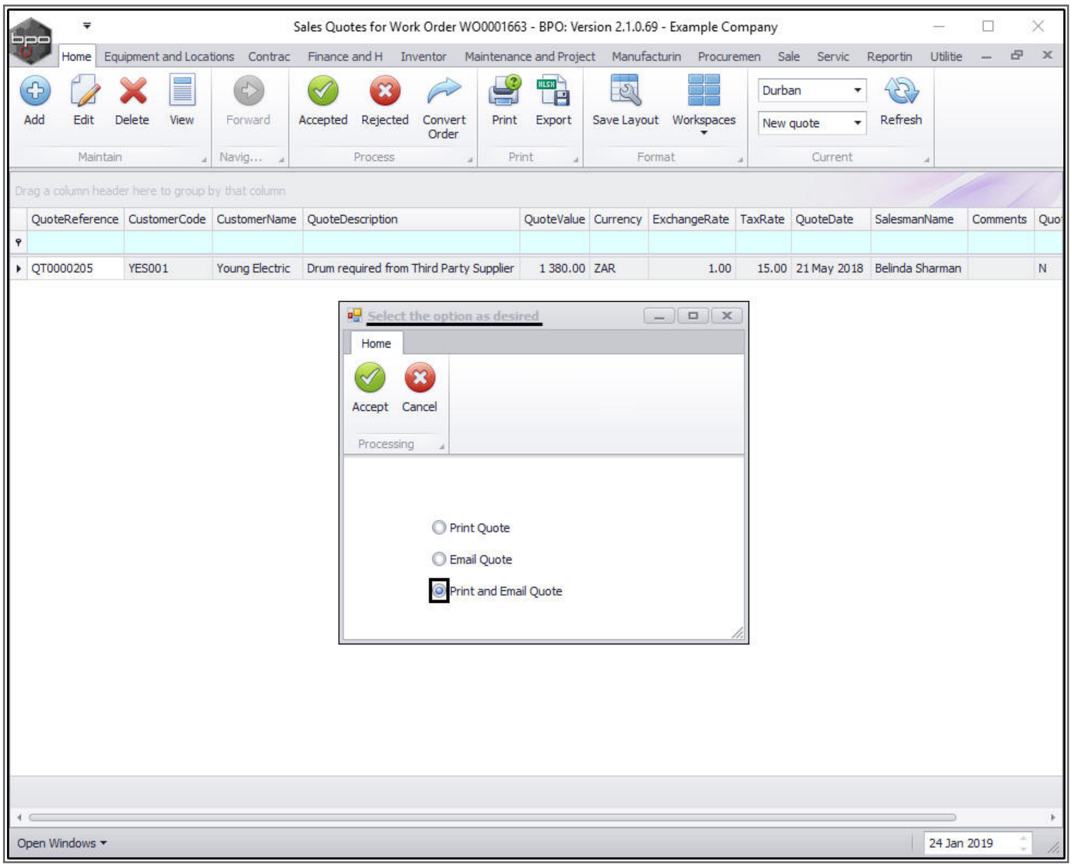
PRINT, EMAIL QUOTE

In the Sales Quotes for Work Order [ ] listing screen,

- Click on the ***row selector*** in front of the ***quote***.
- Click on ***Print***.

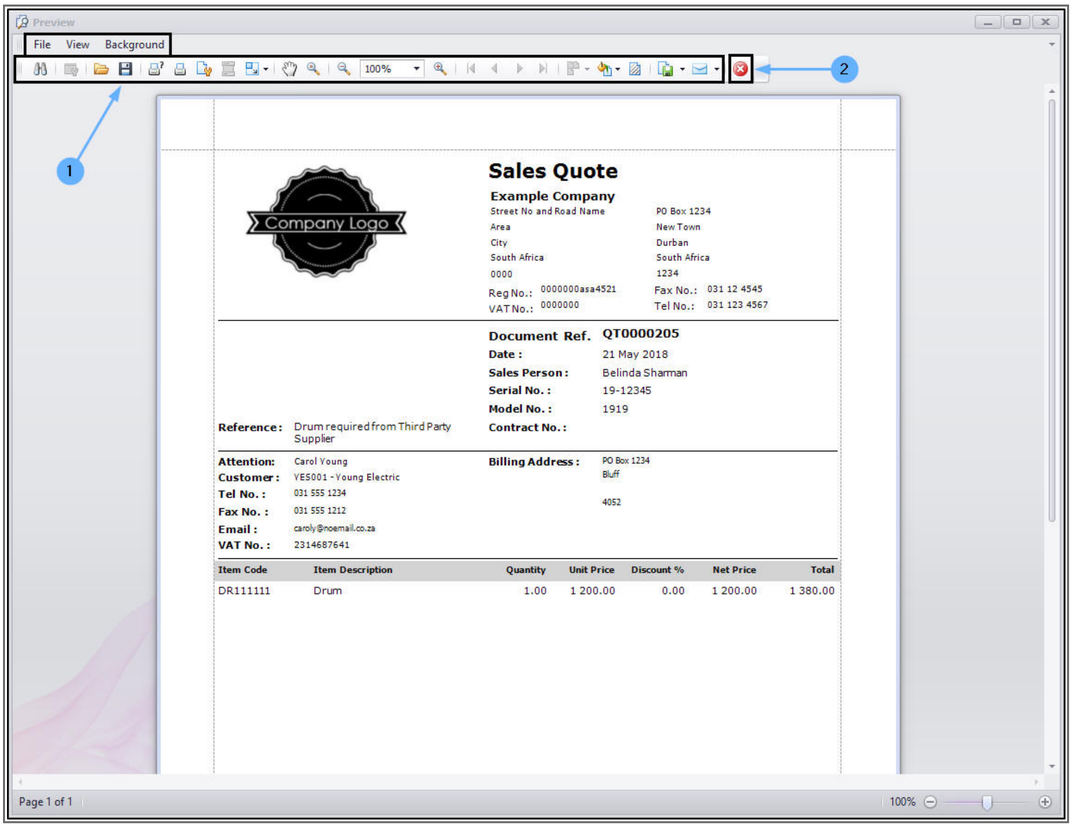


- A ***Select the option as desired*** pop up menu will appear with ***Print*** and ***Email*** choices.
- Click on the ***radio button*** in front of your selected option.
    - In this example, ***Print and Email Quote*** has been selected.
- Click on ***Accept***.



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

1. From here you can ***View***, ***Print***, ***Export*** or ***Email*** the Sales Quote.
2. ***Close*** this screen when you are done.

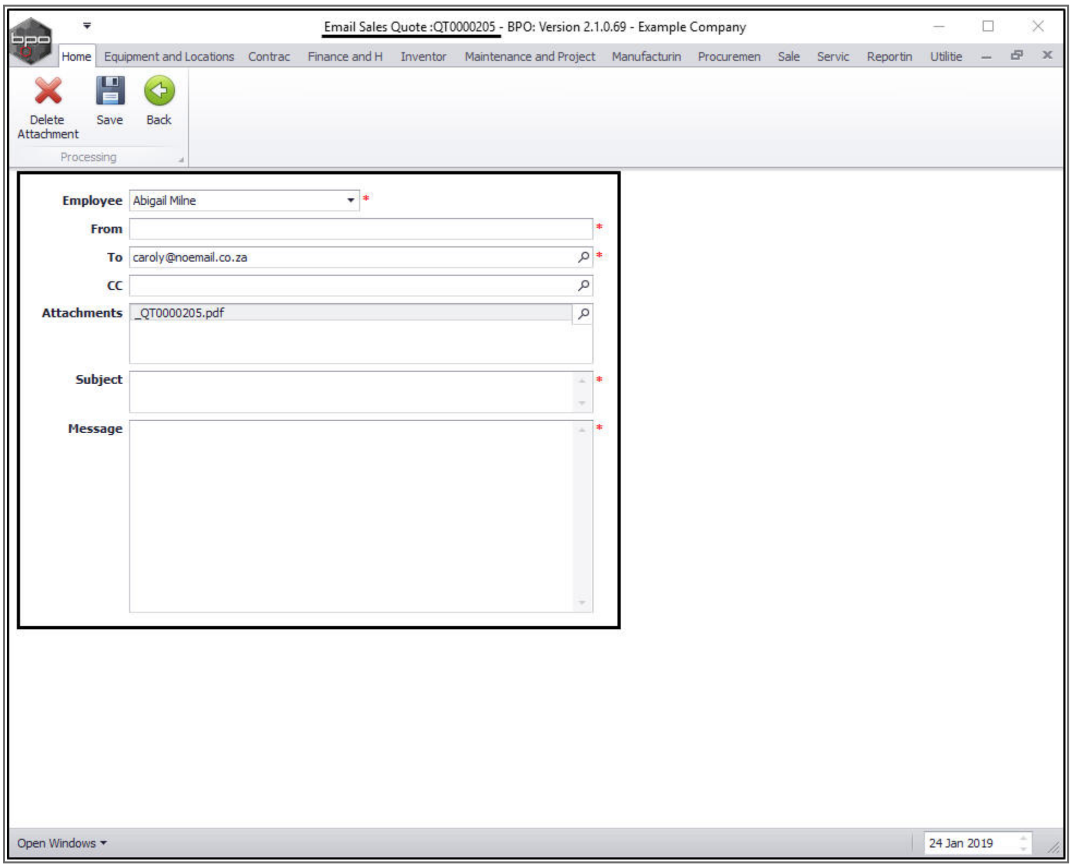


As the Report Preview screen is closed the ***Email Sales Quote: [ ]*** screen will be displayed.

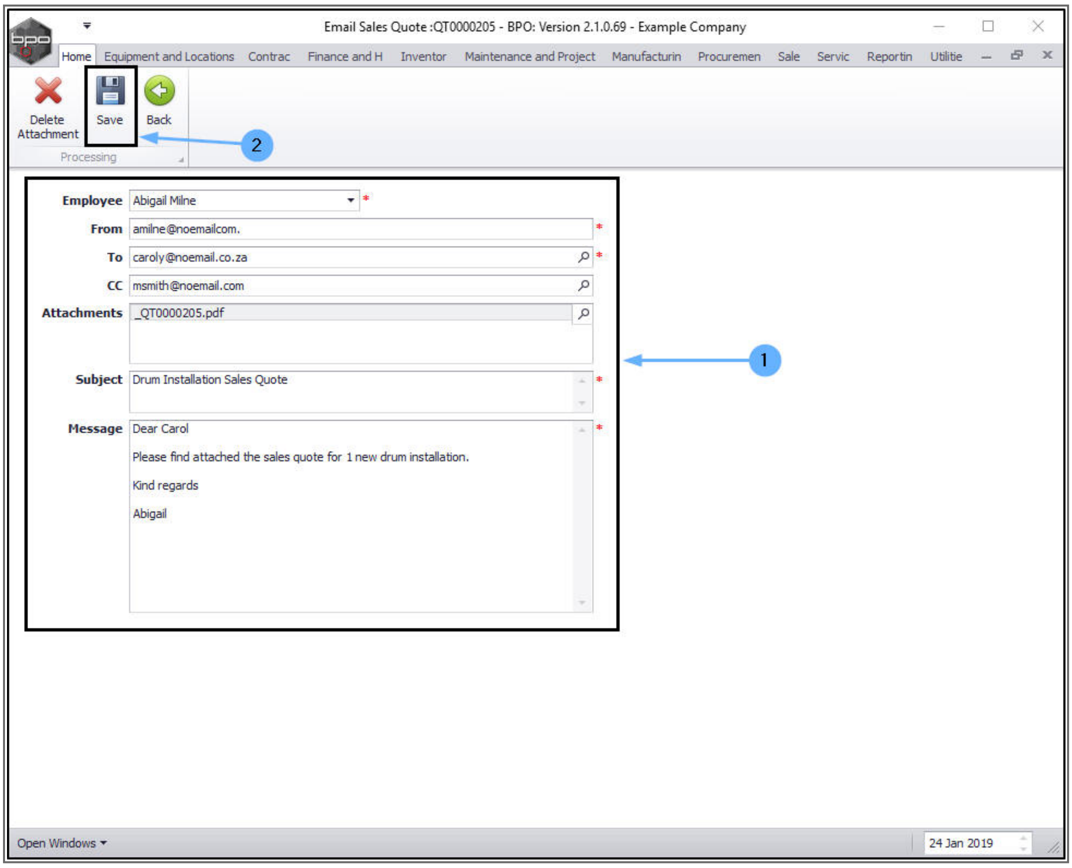
- **Employee:** This will populate with the employee who is currently logged on to the system. You can click on the drop-down arrow and select an alternative employee, if required.
- **From:** Type in the email address of the employee above.
- **To:** This will populate with the email address of the Customer Contact selected on the Quote (the accounts person will be always added to this). You can also type in an additional email address (separated by a semi-colon), or click on the search button and select

from the pop up screen, an additional customer contact(s).

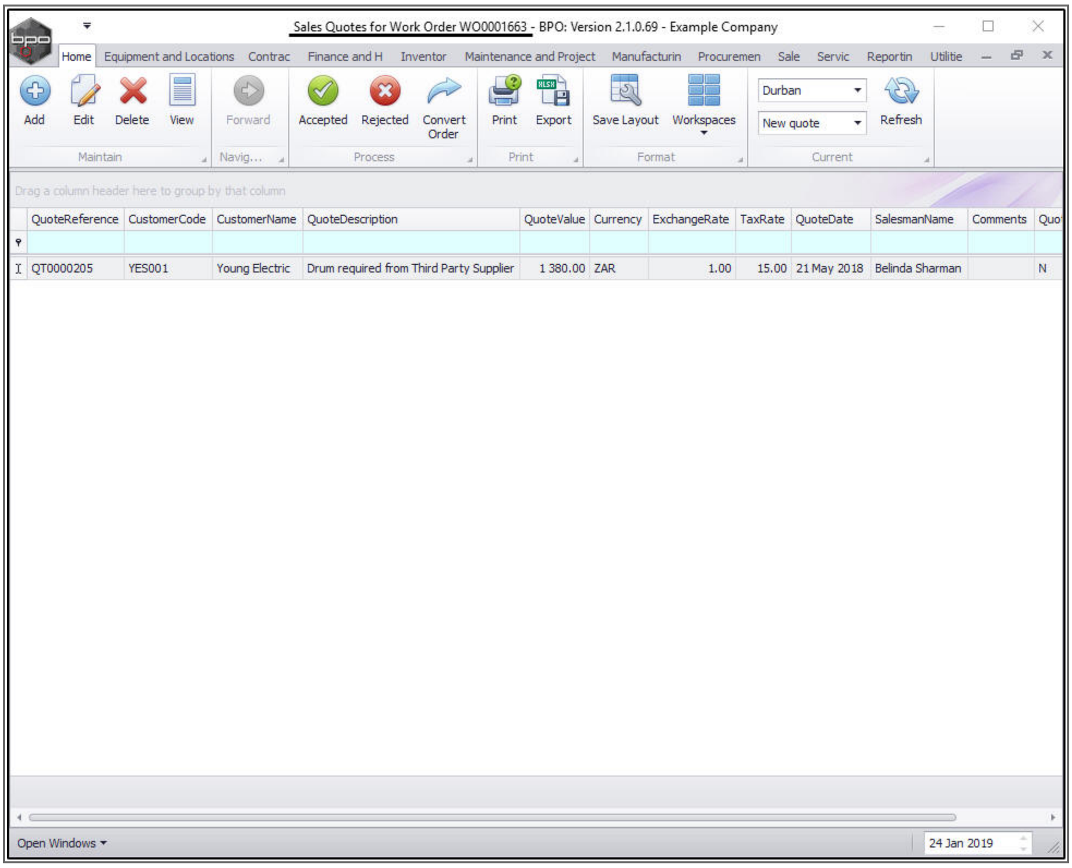
- **CC:** If a group email address has been set up on the quote or accounts contact, that will pull through here. You can also type in an additional email address (separated by a semi-colon), or click on the search button and select from the pop up screen, an additional customer contact(s).
- **Attachments:** BPO will create a PDF of the quote and attach it automatically. (You can also attach additional documentation by clicking on the search button and browsing for the file you wish to attach.)
- **Subject:** Type in the email subject.
- **Message:** Type in a message regarding the email.



1. When you have added all the required details to this screen,
2. click on ***Save***.



- The email will be sent from the ***server*** and you will return to the ***Sales Quotes for Work Order [ ]*** listing screen.



Related Topics

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

Convert to Sales Order

Add Items to WO

MNU.073.014