

SALES STUDIO CONFIGURATION

VIEW QUOTE DEFAULT ITEMS

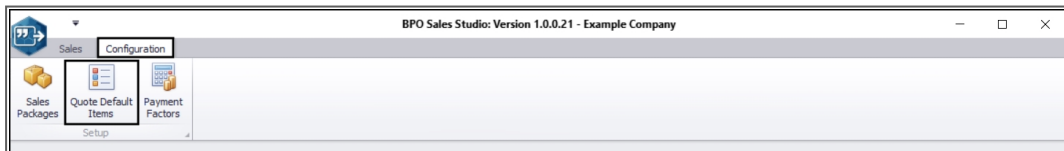
Default items are items that are premeditatedly set up to be added to all new quotes.

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 preconfigured items pull through to each new quote, any or even all of these items can be individually **removed** from each quote or **edited**, if required.

Follow the process below to **view** current linked quote default items.

Ribbon Access: *Sales Studio > Configuration > Quote Default Items*

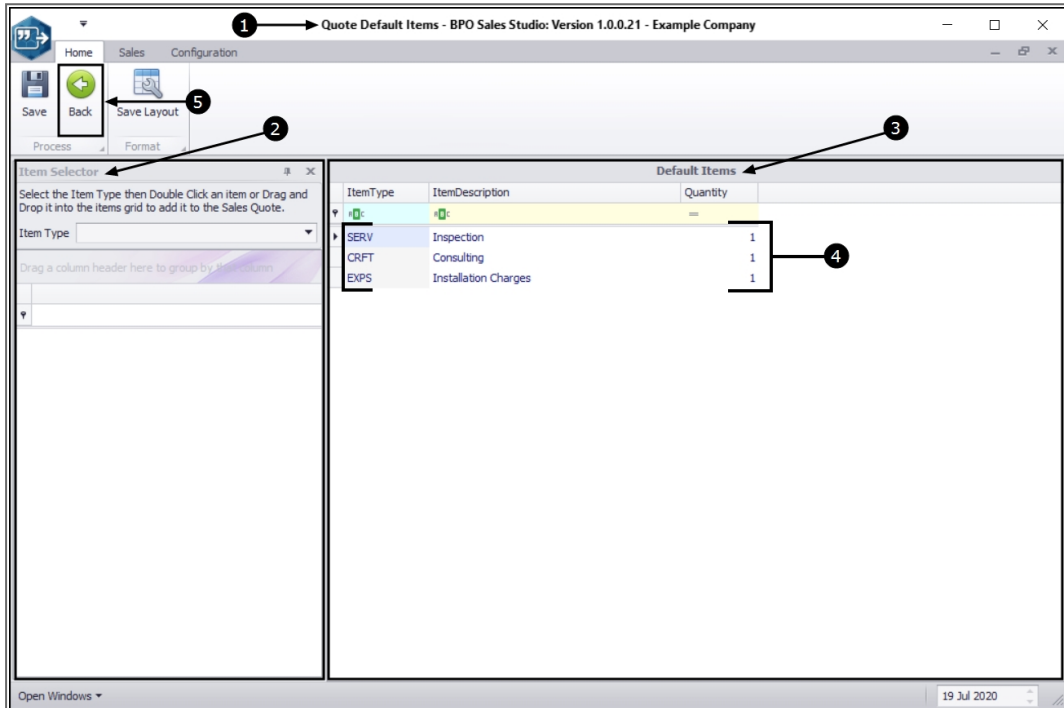


THE QUOTE DEFAULT ITEMS SCREEN

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 **Default Items** frame on the right of the screen.

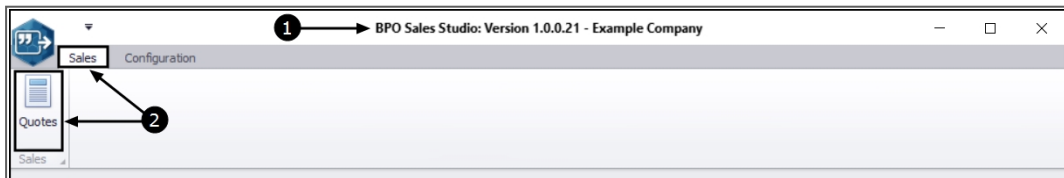
VIEW CURRENTLY LINKED QUOTE DEFAULT ITEMS

3. The **Default Items** frame, contains items that have already been linked and will appear on each new Sales Quote.
4. In this example, A **Inspection** fee, a **Consulting** fee and an **Installation Charges** fee have already been set up to link to each new quote.
5. Click on **Back** to return to the Sales Studio landing page.

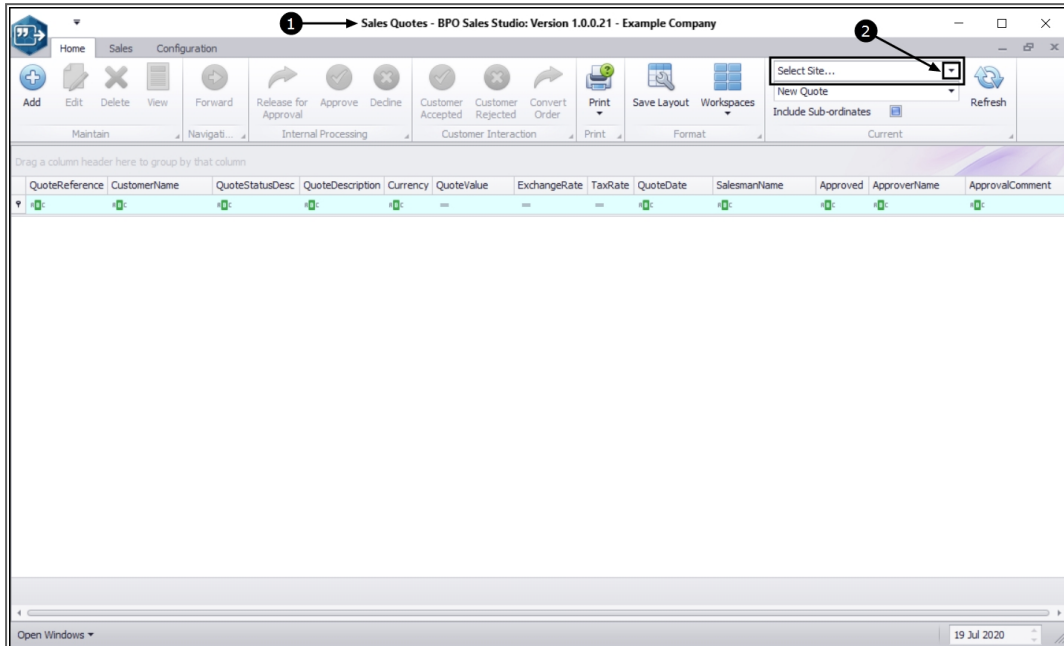


VIEW CURRENT DEFAULT ITEMS ON A NEW SALES QUOTE

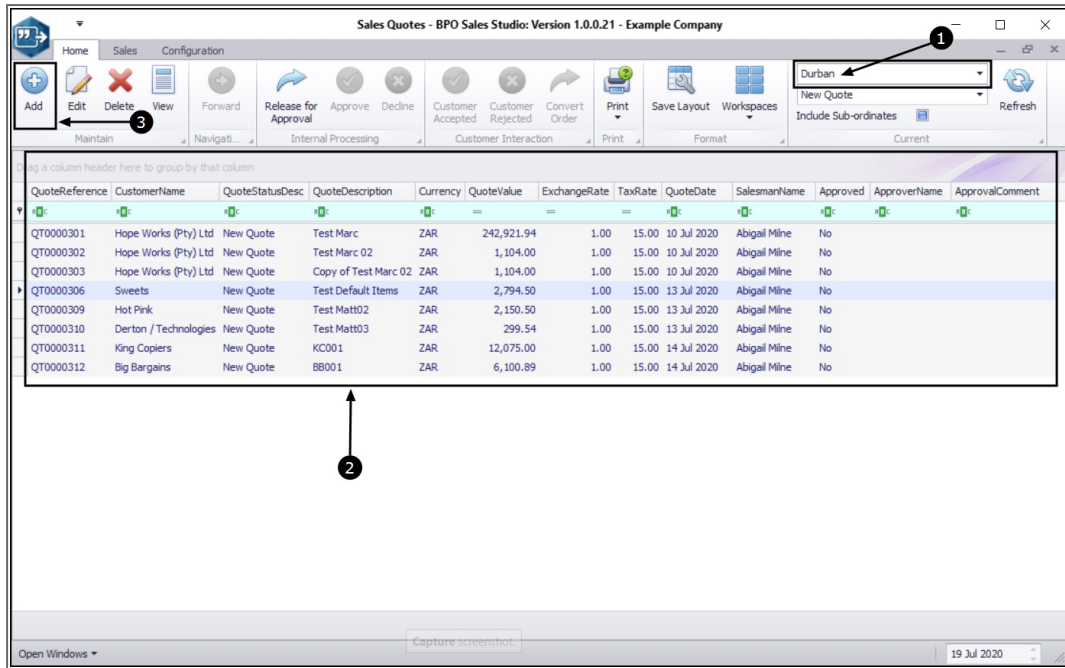
1. In the Sales Studio landing page,
2. select **Sales > Quotes**.



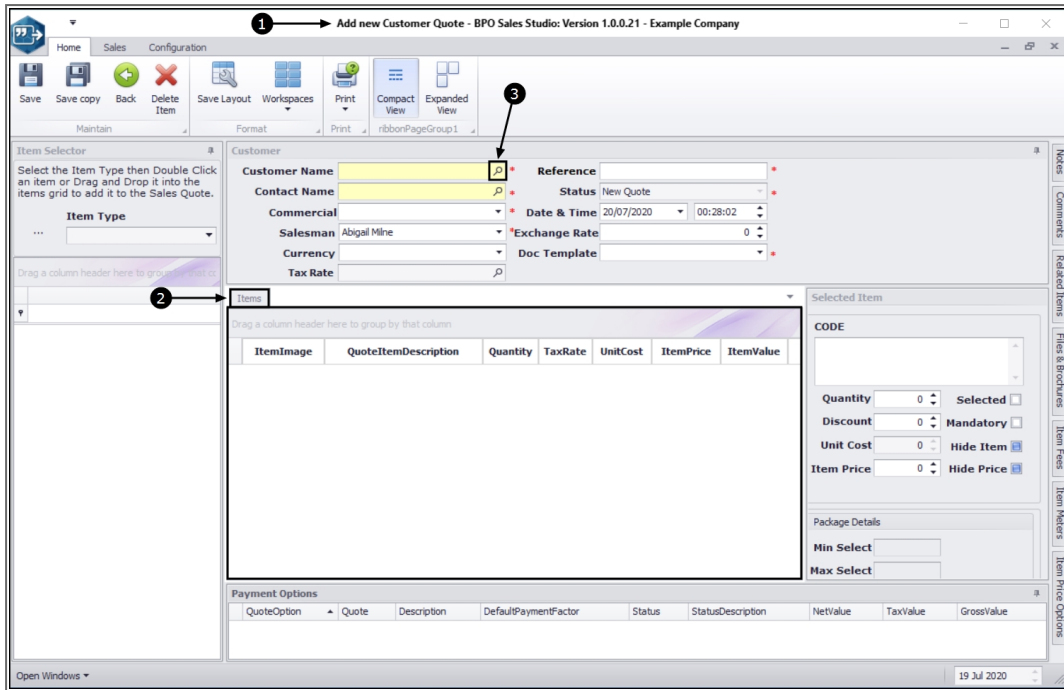
1. The **Sales Quotes** listing screen will be displayed.
2. Click on the drop-down arrow and select from the menu, the correct **site**.



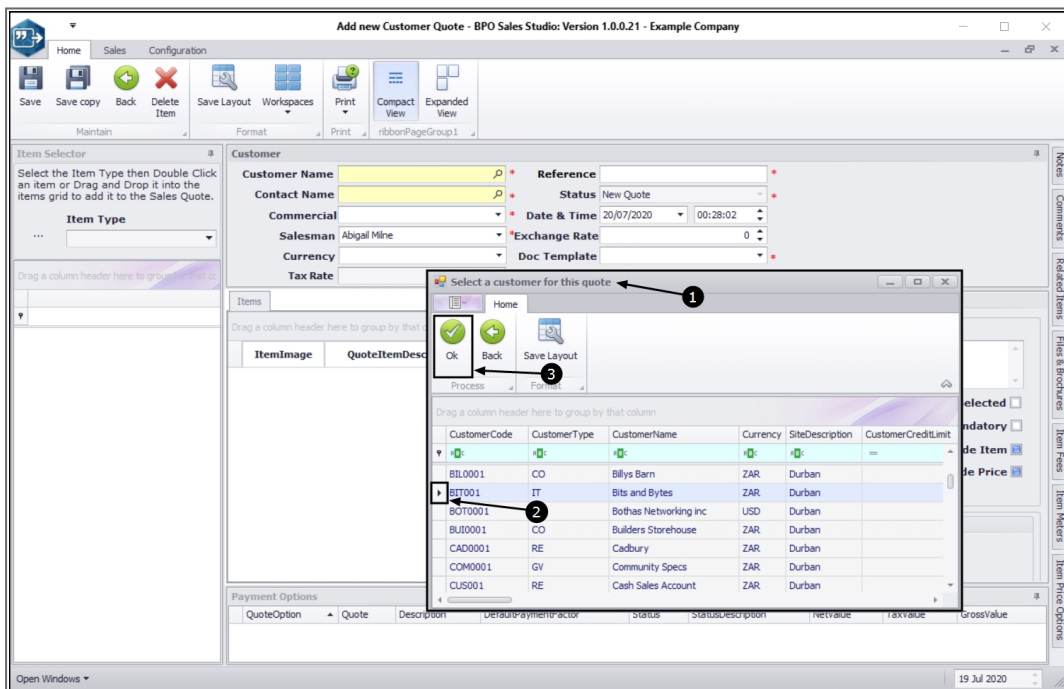
1. As the selected site populates the **Site** field,
2. the **Quotes data grid** will populate with all the quotes linked to that site.
3. Click on **Add**.



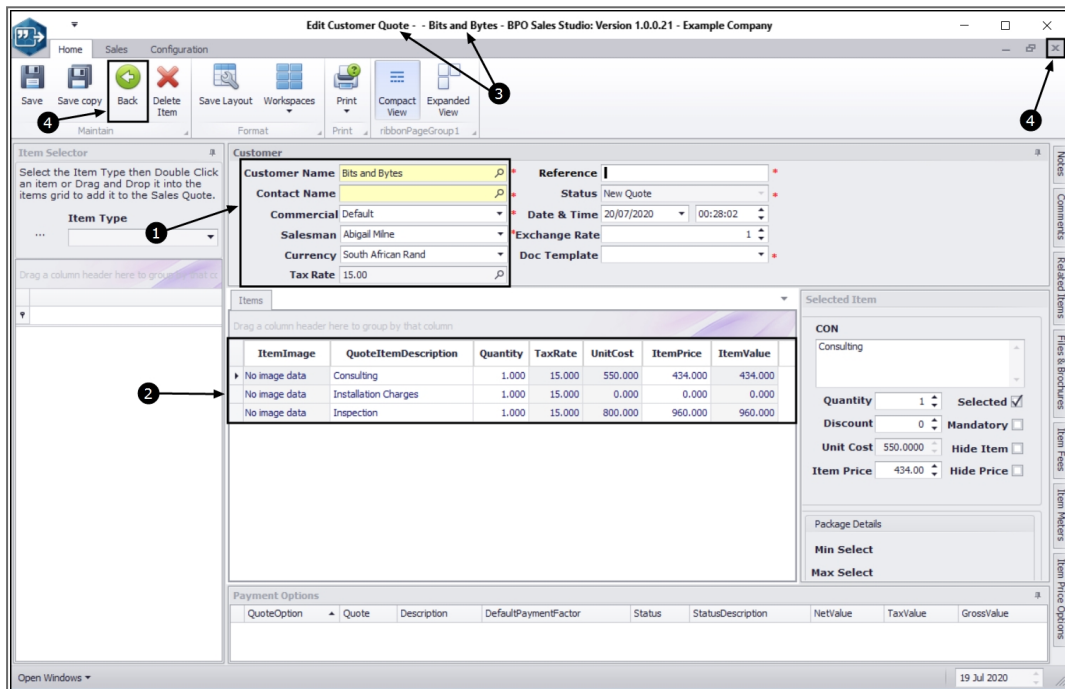
1. The **Add new Customer Quote** screen will open.
2. You will note that no Quote Default Items currently populate the Items frame. If there are any Default Items set up, they will only display when a customer is selected.
3. Click on the lookup icon in the **Customer Name** field.



1. The **Select a customer for this quote** screen will pop up.
2. Select the customer.
3. Click on **Ok**.



1. As the selected customer details populate the **Customer** frame,
2. the **Items** frame will auto populate with the items that were set up in the Quote Default Items screen (image 2). These items can be **edited** or **deleted** from this screen.
3. You will note that the title of the screen changed to **Edit Customer Quote** and the selected **customer's name** can now be viewed.
4. Click on **Back** or **Close** (without saving any changes) to exit the **Edit Customer Quote** screen and then **Close** the **Sales Quotes** listing screen to return to the **Quote Default Items** screen.



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