SALES STUDIO CONFIGURATION

ADD QUOTE DEFAULT ITEMS

Default items are items that are 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 items pull through to each new quote, each item can be individually ***removed*** from each quote or ***edited***, if required.

Follow the process below to ***add*** quote default items.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

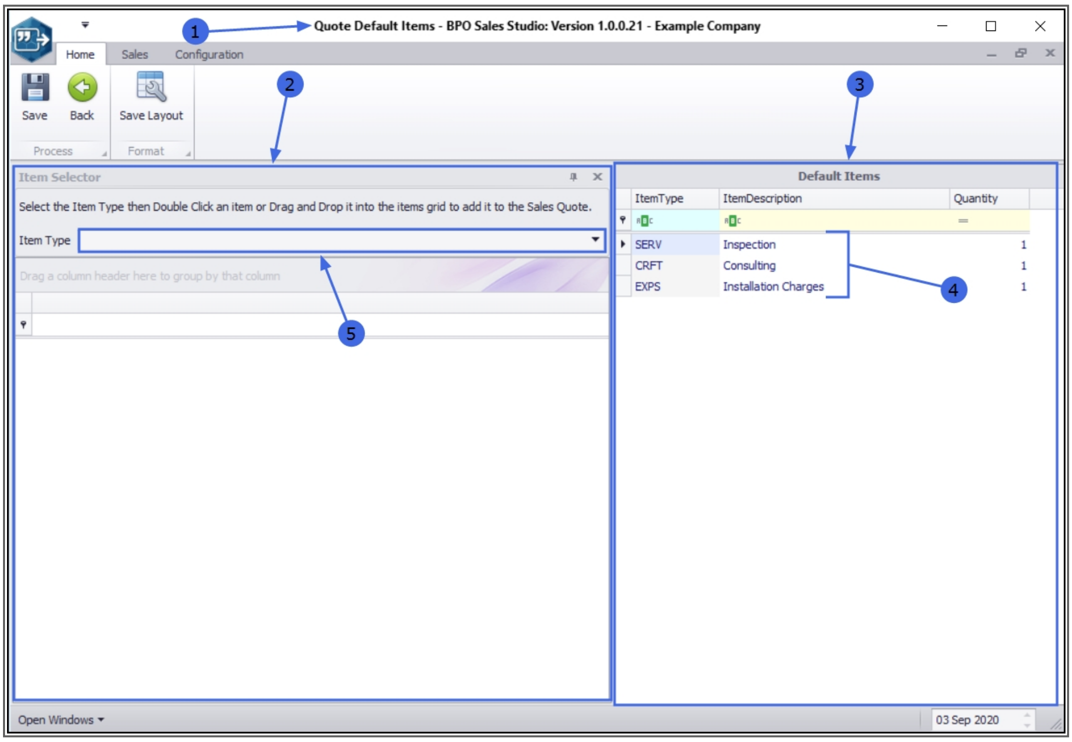
Ribbon Access: *Sales Studio > Configuration > Quote Default Items*

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
3. ***Default Items*** frame, on the right of the screen. This frame, contains items that have already been linked and will appear on each new Sales Quote.
4. In this example, an ***Inspection*** fee, a ***Consulting*** fee and an ***Installation Charges*** fee have already been set up to link to each new quote.

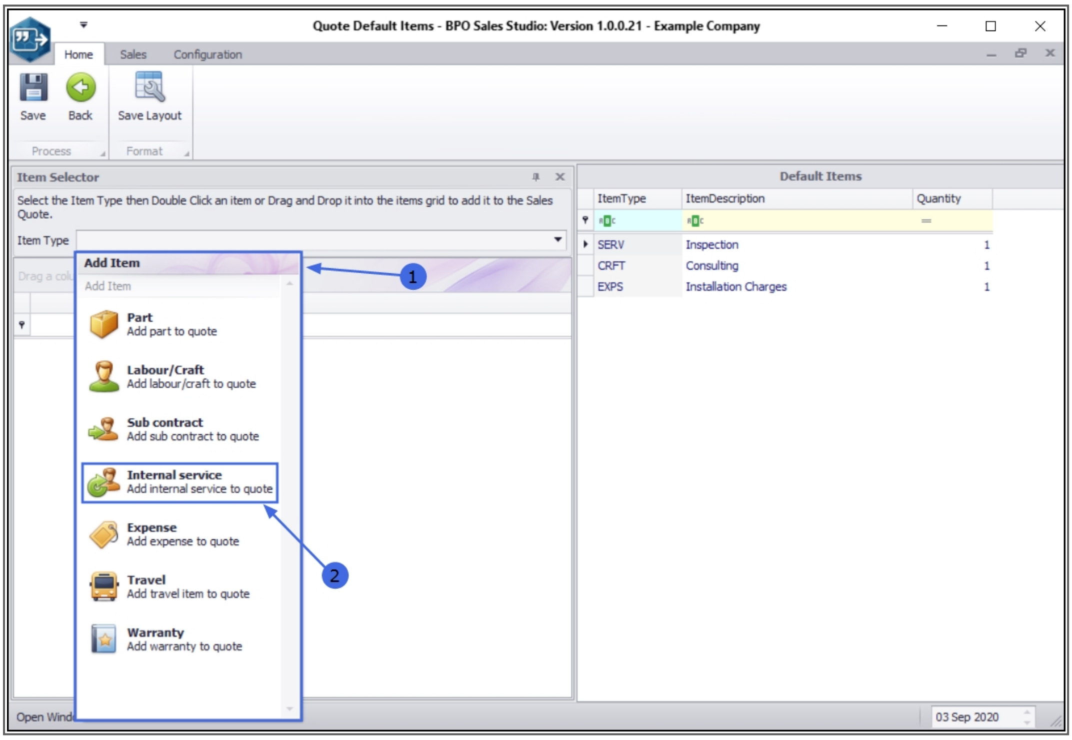
SELECT THE ITEM TYPE

5. In the Item Selector frame, click anywhere in the ***Item Type*** field.



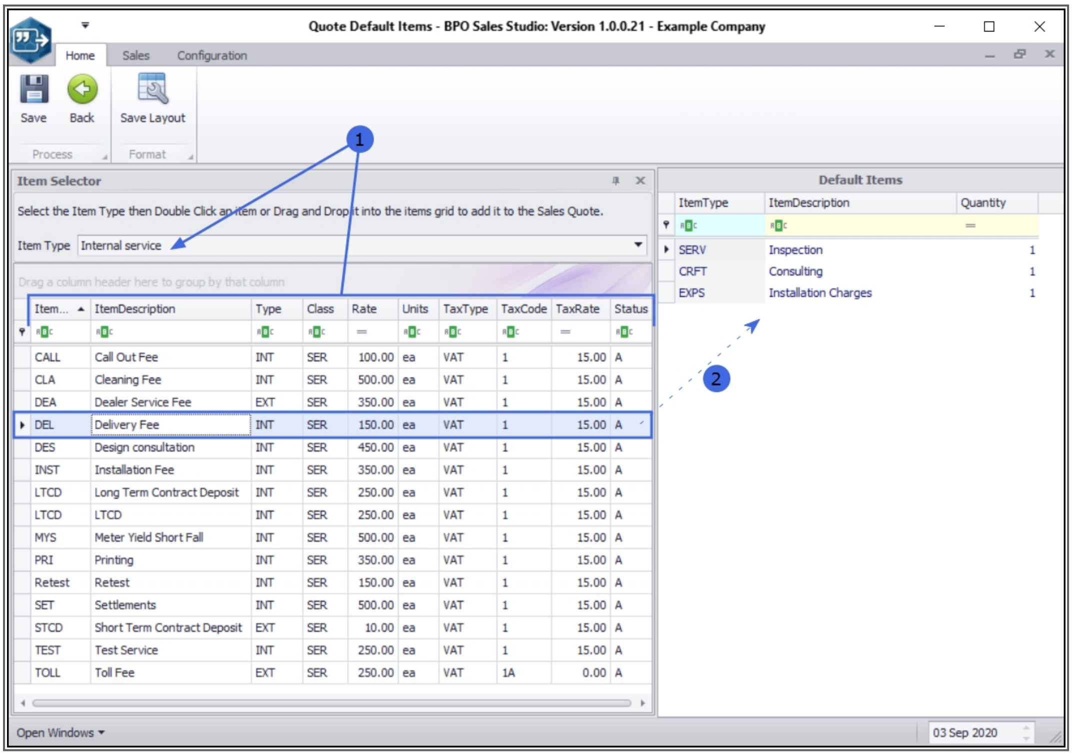
SELECT ITEM TYPE

1. The ***Add Item*** menu will pop up.
2. Select from the list, the required ***Item Type***.
    - In this example, ***Internal Service*** is selected.



SELECT ITEM TO ADD TO THE QUOTE

1. The ***Item Selector*** frame will populate with a data grid of all the items linked to the selected ***Item Type***.
2. Select the required item and either,
    1. ***Double click*** in the item row or,
    2. ***Drag*** and ***drop*** the selected item into the ***Default Items*** frame.
        - In this example, ***Delivery Fee*** is selected.

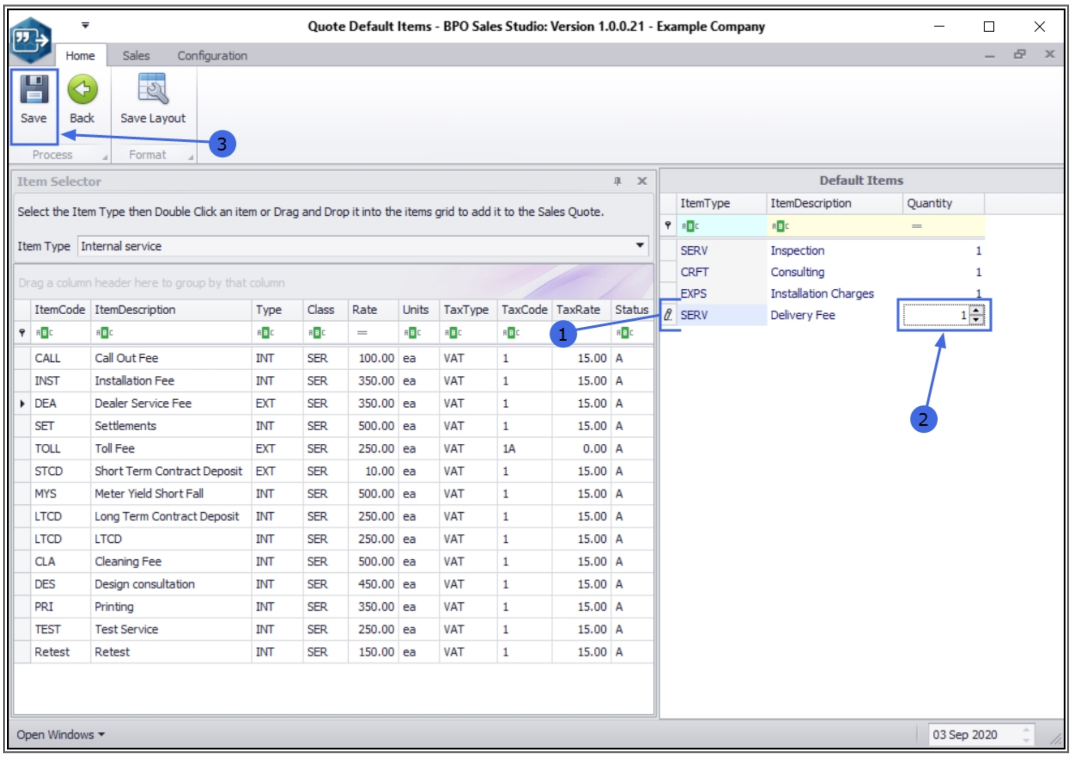


ADJUST ITEM QUANTITY

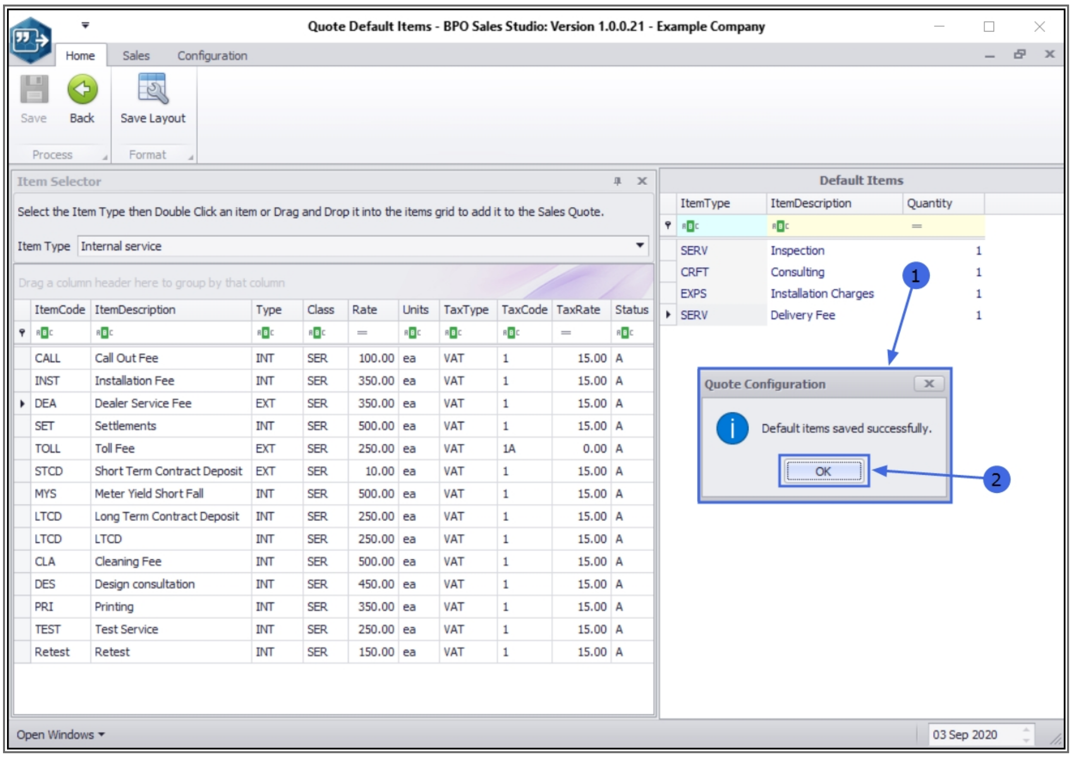
1. You will see the selected item is now added to the data grid in the ***Default Items*** frame.
2. Click in the ***Quantity*** column to display directional arrows. You can either,
   i. ***Type in*** or
   ii. Use the directional ***arrows*** to select an alternative quantity, if required.

SAVE ADDED DEFAULT ITEMS

3. When you have added all the required items to the Default Items frame, click on ***Save***.

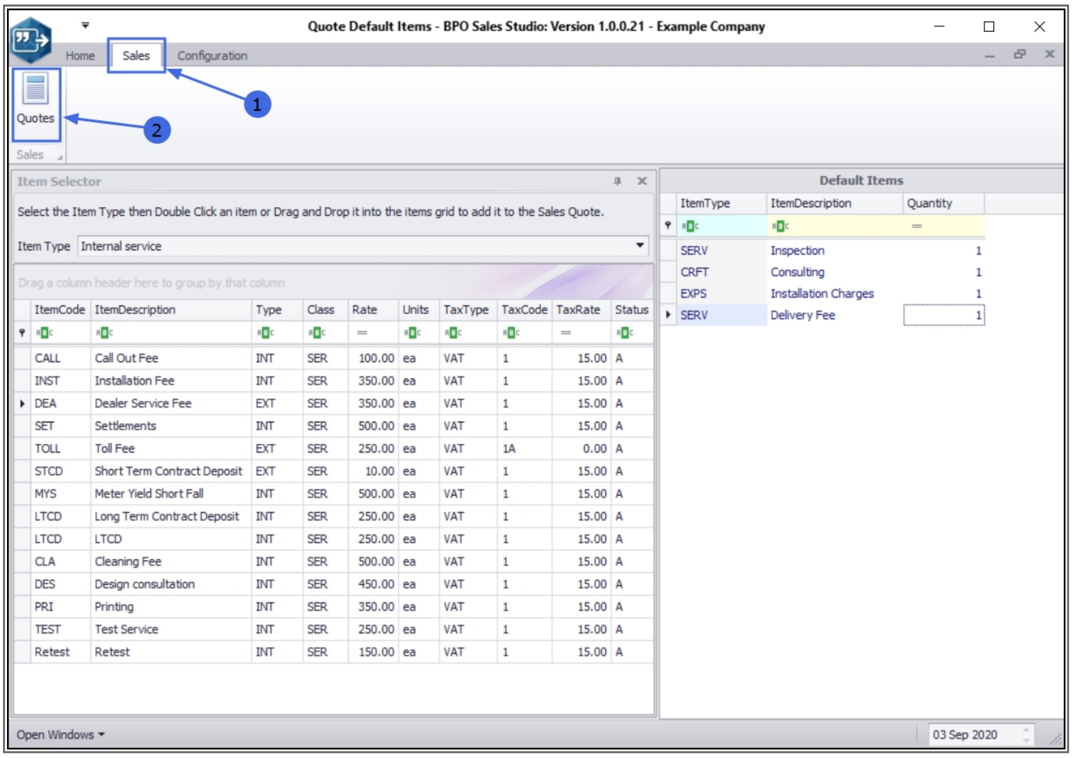


1. A ***Quote Configuration*** message box will pop up informing you;
    - ***Default items saved successfully.***
2. Click on ***OK***.

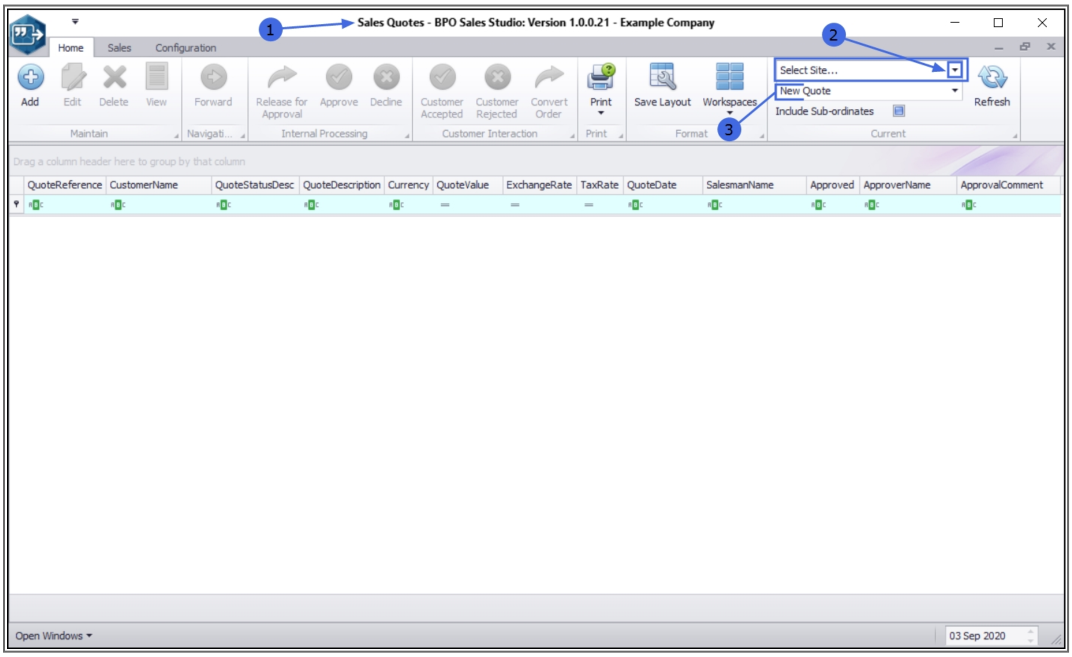


VIEW ADDED DEFAULT ITEM ON A SALES QUOTE

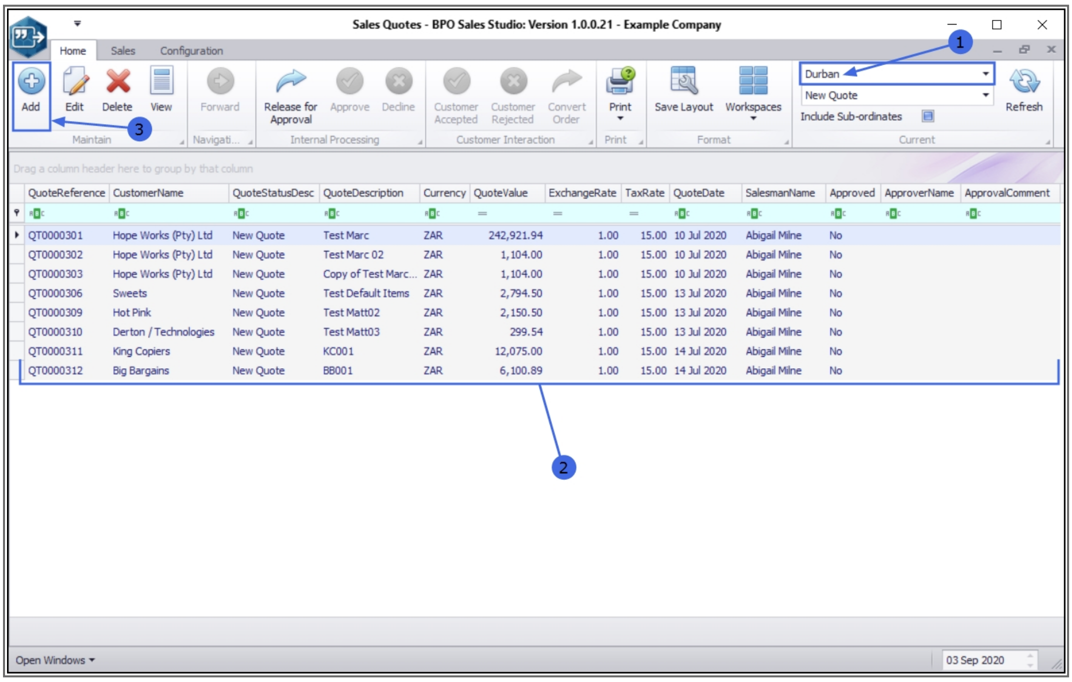
1. Click on the ***Sales*** ribbon tab.
2. The screen will refresh to display the ***Quotes*** toolbar button, click on this button.



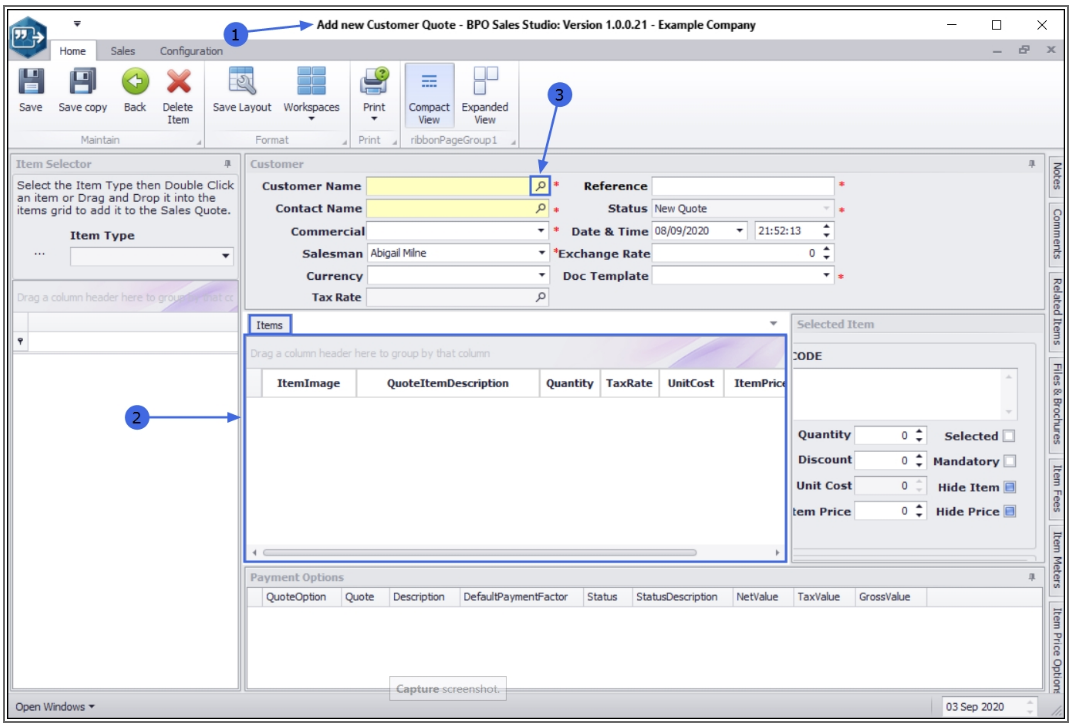
1. The ***Sales Quotes*** listing screen will open.
2. Click on the drop-down arrow in the ***Site*** field and select from the list, the applicable site.
3. Upon opening this screen, the ***Status*** field auto populates with ***'New Quote'.*** You can click on the drop-down ***arrow*** in this field and select an alternative status from the list that will appear. For the purpose of this manual, the status will remain as ***New Quote***.



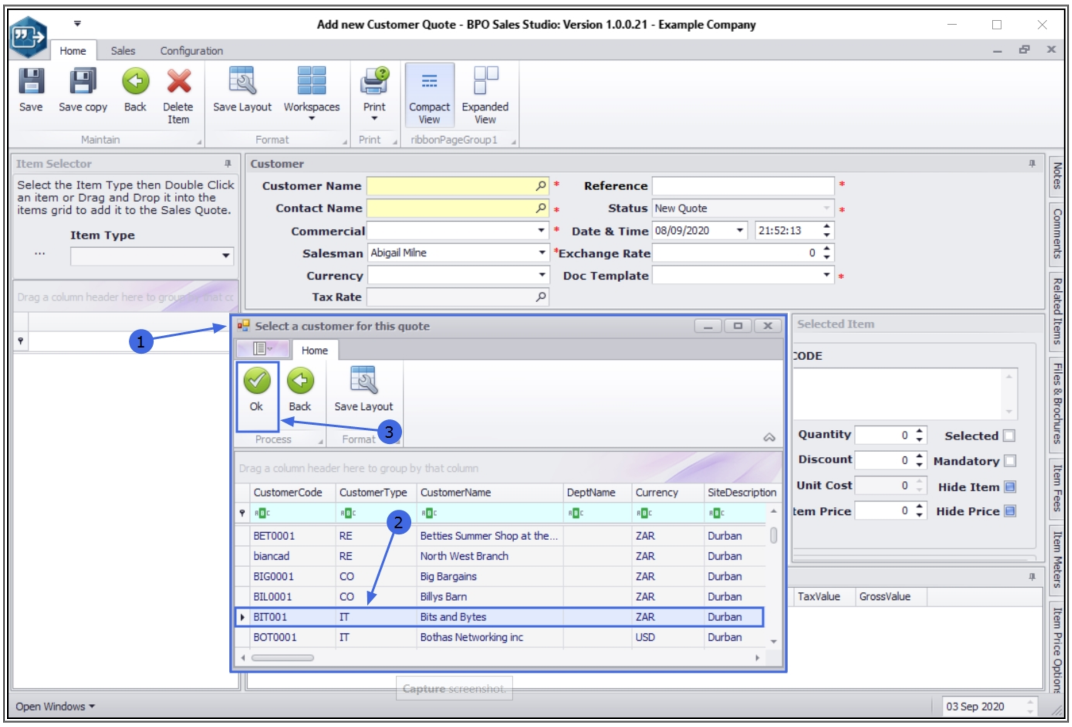
1. Once you have selected the site,
2. the data grid will populate with all the ***New Quotes*** linked to that specific site.
3. Click on ***Add***.



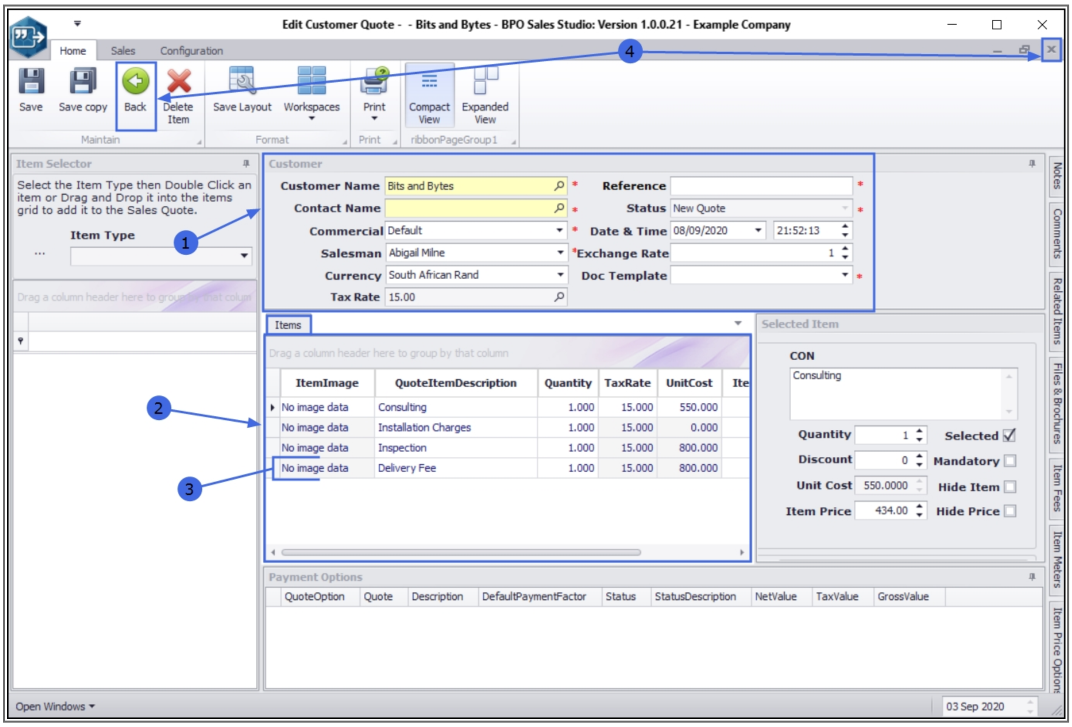
1. The ***Add new Customer Quote*** screen will open.
2. You will note that the ***Items*** frame does not yet contain any item details.
3. A customer needs to be selected before the default items will populate this frame. Click on the ***search*** icon in the ***Customer Name*** field.



1. The '***Select a customer for this quote***' screen will pop up.
2. Select the ***row*** of the customer that you wish to view.
3. Click on ***Ok***.



1. As the selected customer details populate the ***Customer*** frame,
2. the ***Items*** frame will populate with all the Default Quote Items as listed in the Quote Default Items screen.
3. You will note that the *recently added* default item (image 5) also appears here.
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.


Edit Customer Quote - - Bits and Bytes - BPO Sales Studio: Version 1.0.0.21 - Example Company
Home
Sales
Configuration
Save
Save copy
Back
Delete Item
Save Layout
Workspaces
Print
Compact View
Expanded View
Maintain
Format
Print
ribbonPageGroup1
Item Selector
Select the Item Type then Double Click an item or Drag and Drop it into the items grid to add it to the Sales Quote.
Item Type
Customer
Customer Name
Bits and Bytes
Contact Name
Commercial
Default
Salesman
Abigail Milne
Currency
South African Rand
Tax Rate
15.00
Reference
Status
New Quote
Date & Time
08/09/2020
21:52:13
Exchange Rate
Doc Template
Items
Drag a column header here to group by that column
ItemImage
QuoteItemDescription
Quantity
TaxRate
UnitCost
No image data
Consulting
Installation Charges
Inspection
Delivery Fee
1.000
15.000
550.000
0.000
800.000
Selected Item
CON
Consulting
Quantity
Selected
Discount
Mandatory
Unit Cost
550.0000
Hide Item
Item Price
434.00
Hide Price
Payment Options
QuoteOption
Quote
Description
DefaultPaymentFactor
Status
StatusDescription
NetValue
TaxValue
GrossValue
Open Windows
03 Sep 2020
Notes
Comments
Related Items
Files & Brochures
Item Fees
Item Meters
Item Price Options
1
2
3
4

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