

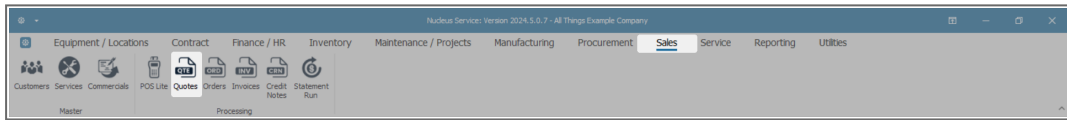
# SALES

## QUOTES - PRINT A SALES QUOTE

When using the **Email** option to send a Sales Quote, please note that it will be mailed via the Nucleus Service Email Service on the server and not from Microsoft Outlook on your local PC.

A Sales Quote can also be printed from the **Add, Edit** or **View** a Sales Quote screens.

### Ribbon Select Sales > Quotes






- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** you wish to work in.
  - The example has **KwaZulu-Natal** selected.
- Select the **Status** of the quote you wish to print.

You can print a Quote in any Status.

- The example has **New Quote** selected.
- Select the **row** of the quote you wish to print.
- Click on **Print**.

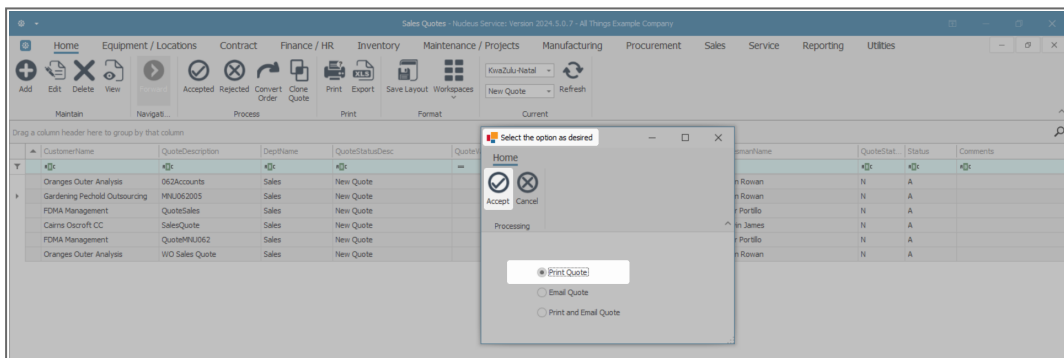
CustomerName	QuoteDescription	QuoteName	QuoteStatusDesc	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	QuoteStat	Status	Comments
Oranges Outer Analysis	NS2Accounts	Sales	New Quote	5,313.00	ZAR	1.00	15.00	20 May 2024	Eden Rowan	N	A	
Gardening FechoH Outourcing	MNU02005	Sales	New Quote	5,313.00	ZAR	1.00	15.00	08 Aug 2024	Eden Rowan	N	A	
FDMA Management	QuoteSales	Sales	New Quote	4,830.00	ZAR	1.00	15.00	09 Aug 2024	Brian Portillo	N	A	
Cairns Ocroft CC	SalesQuote	Sales	New Quote	2,639.25	ZAR	1.00	15.00	13 Aug 2024	Kevin James	N	A	
FDMA Management	QuoteMNU062	Sales	New Quote	4,588.50	ZAR	1.00	15.00	15 Aug 2024	Brian Portillo	N	A	
Oranges Outer Analysis	WO Sales Quote	Sales	New Quote	4,588.50	ZAR	1.00	15.00	15 Aug 2024	Eden Rowan	N	A	

- The **Select the option as desired** screen will display the following options -

-  **Print Quote** (Open the quote in Report Preview to view, print, export or email).
-  **Email Quote** (Specify the email recipients and the system will generate a .pdf attachment of the quote).
-  **Print/Email Quote** (both the Report Preview and Email screens will pop up).

## PRINT QUOTE

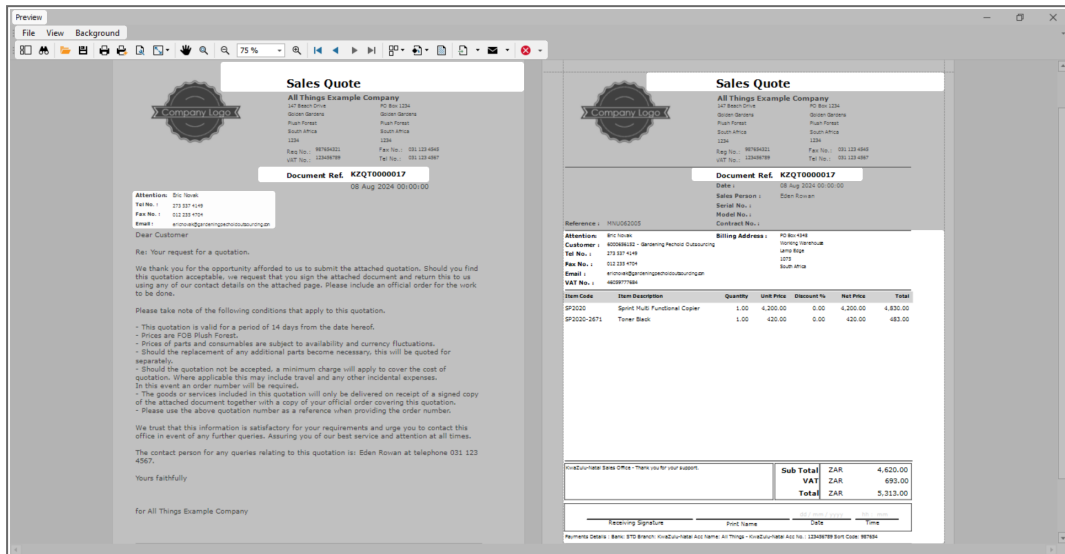
- To Print the Quote to the Preview window, click the **Print Quote** radio button.
- Click on **Accept**.



## REPORT PREVIEW SCREEN

- The Sales Quote will display in the Report Preview screen when **Print Quote** or **Print and Email Quote** is selected.
- The Sales Quote cover page will display. (This needs to be configured in your company setup.)

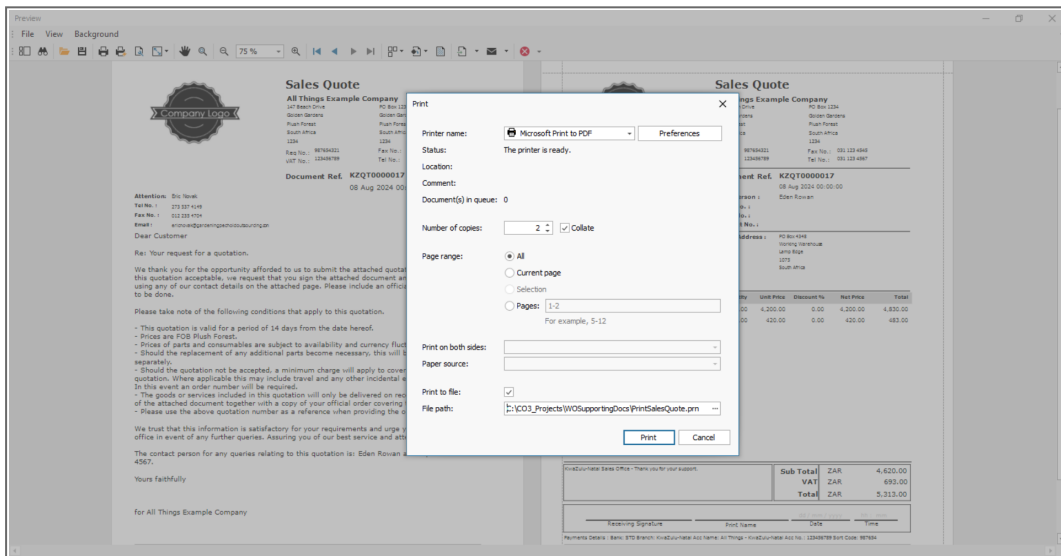
- From the preview screen you can make cosmetic changes to the Quote, as well as **Save, Zoom, Add a Watermark, Export, or Email.**



## PRINT OPTIONS SCREEN

- Clicked **Print** to display the Print Options Screen.
- The **Print Options** Screen will display. From this screen specify:
  - Printer name:** The default printer name will display.
  - Number of copies:** If more than one copy of the quote is required, either type the number or use the **arrow** indicators to select the number of copies you need to print.
    - When multiple copies of the document are requested, **Collated** has been selected by default. This feature can be deselected.
  - Page range:** You can specify the page range by selecting the radio button to print:

- **All** - Print **All** the pages.
- **Current page** will only print the page you are currently in.
- **Pages** allow you to specify the specific pages to print.
- **Print to file:** Ticking this check box will allow you to print the Sales Quote to a .pdf file.
- **File path:** Specify the directory location you would like the .pdf file to be saved to, e.g., c:\CustomerDocuments\SalesQuotes.
- Click on **Print** to proceed.

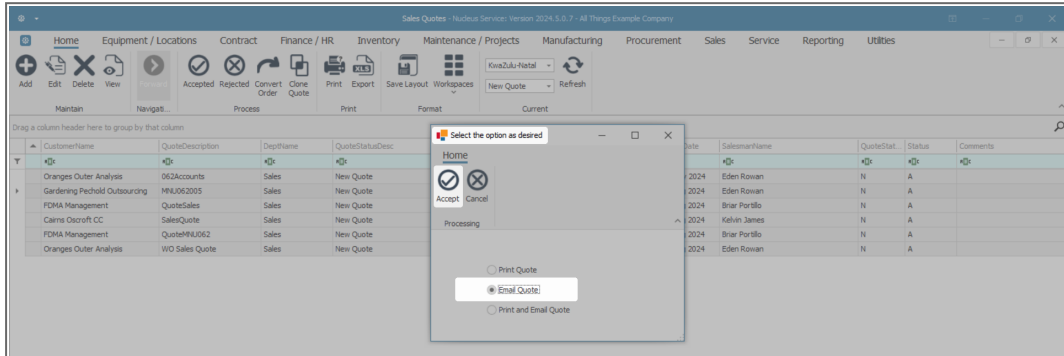


## PRINT AND EMAIL QUOTE



If you get an error when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in Nucleus Service, and that you have the relevant folder rights to access the shared folder on the server.

- From the **Select the option as desired** screen -
- Click on the **Email Quote** or **Print and Email Quote** radio button.
  - The example has **Email Quote** selected.
- Click on **Accept**.

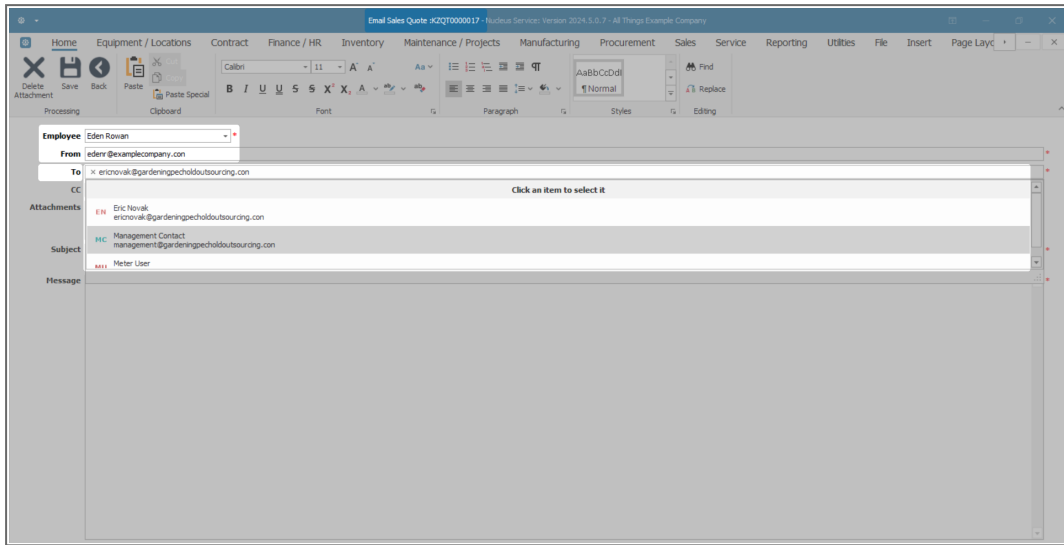


- The **Email Sales Quote: [ ]** screen will be displayed.

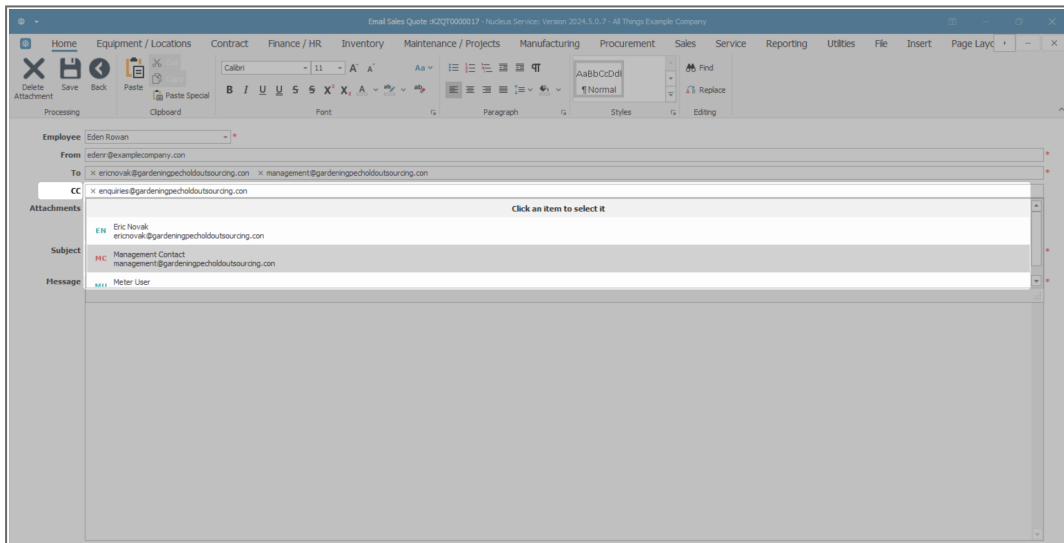
## EMAIL HEADER INFORMATION

- **Employee:** This field will display the name of the employee currently logged on. Click on the **drop-down arrow** to choose an alternative name, if required.
- **From:** The email address for the employee selected above will display. This field can be edited if so required.
- **To:** This field will auto populate with the email address created for the contact person at the customer. To choose an alternative email or to add a second email address:
  - Click in the **row** to display a **drop-down menu** with the linked email address(es) for this customer.
  - Click on the **email address** of the contact that you wish to add.
  - The selected email address will be added.
  - To add an additional contact person, click in the **row** again to select from the **drop-down menu** and add the

contact to the email. The additional email address will be added.

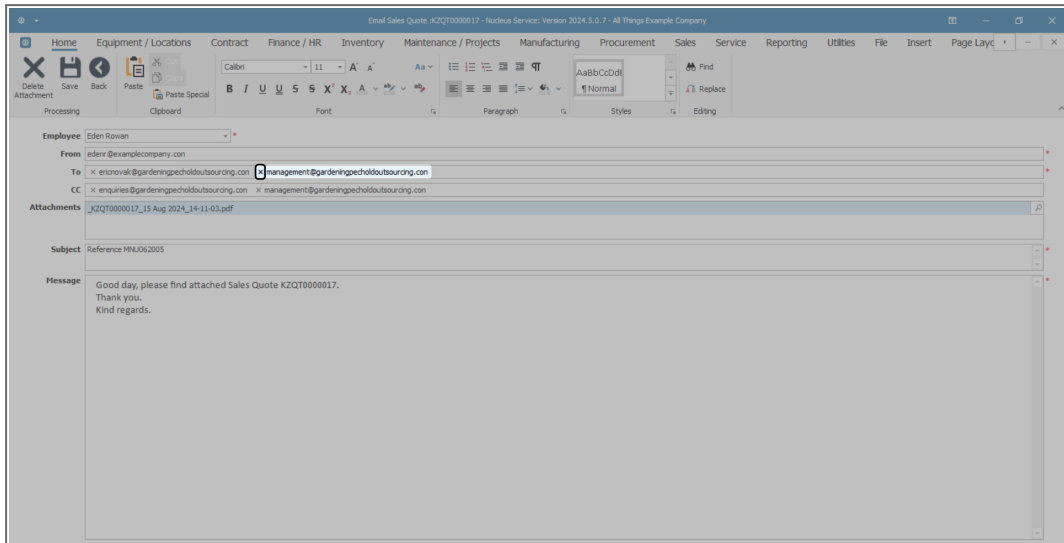


- **CC:** If a group email address has been set up on the quote or accounts contact, then the group email address will display here.



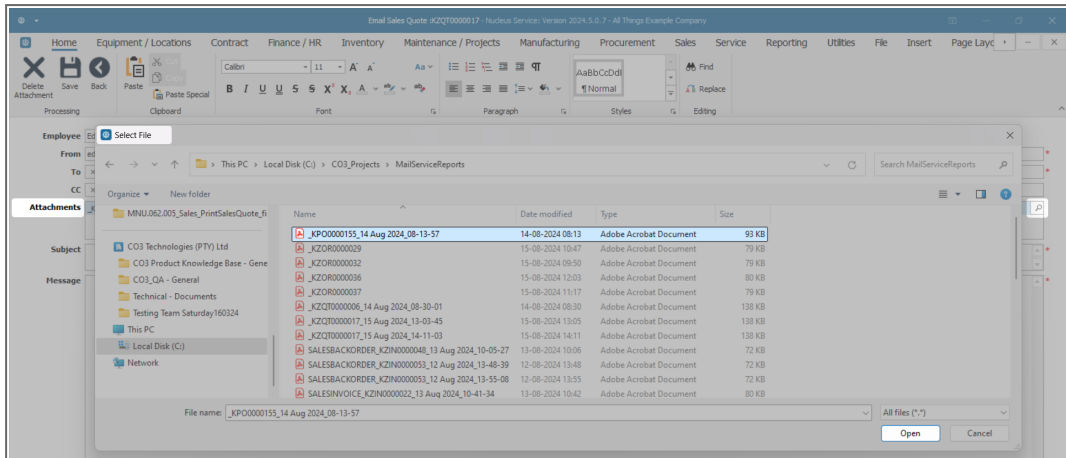
Additional email addresses can be added to either the **To:** or **CC:** by following the process above.

- If you wish to **remove** an email address from the row, click on the **X** icon.



## EMAIL ATTACHMENTS

- **Attachments:** Nucleus Service will create a PDF of the quote and attach it automatically. (You can attach additional documentation if required.)
  - To add an additional attachment, click the **search** button in the Attachments field to display the **Select File** window.
  - You can **browse** to find the file location of the document you wish to attach, then **click** on the file you wish to attach.
  - Once you have selected the file, click on **Open**.

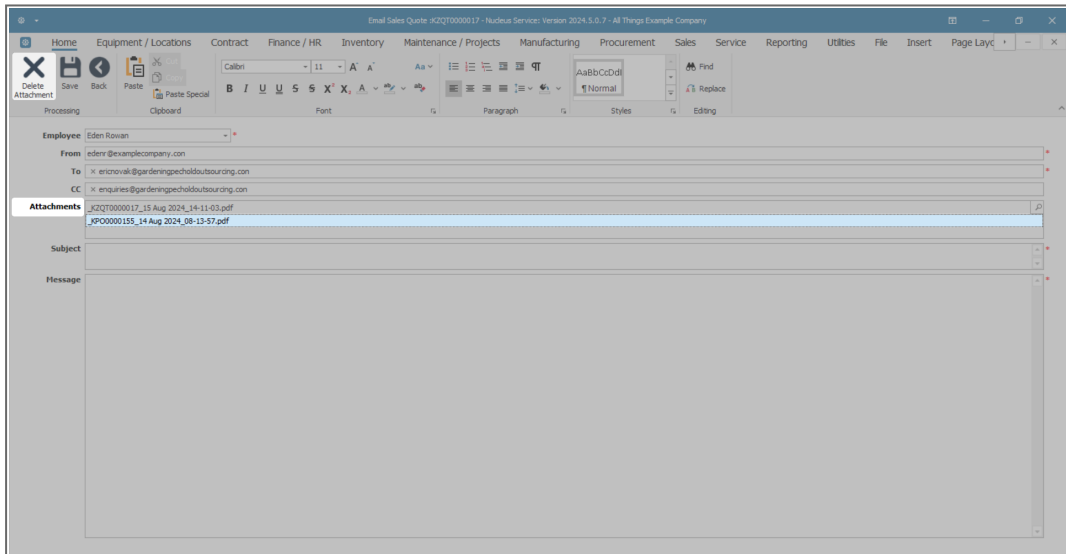


- The document has been added as an **Attachment**.

## Delete Attachment

You may choose to delete an obsolete or incorrectly attached document:

- Click on the attachment you wish to remove.
- Click on **Delete Attachment**.

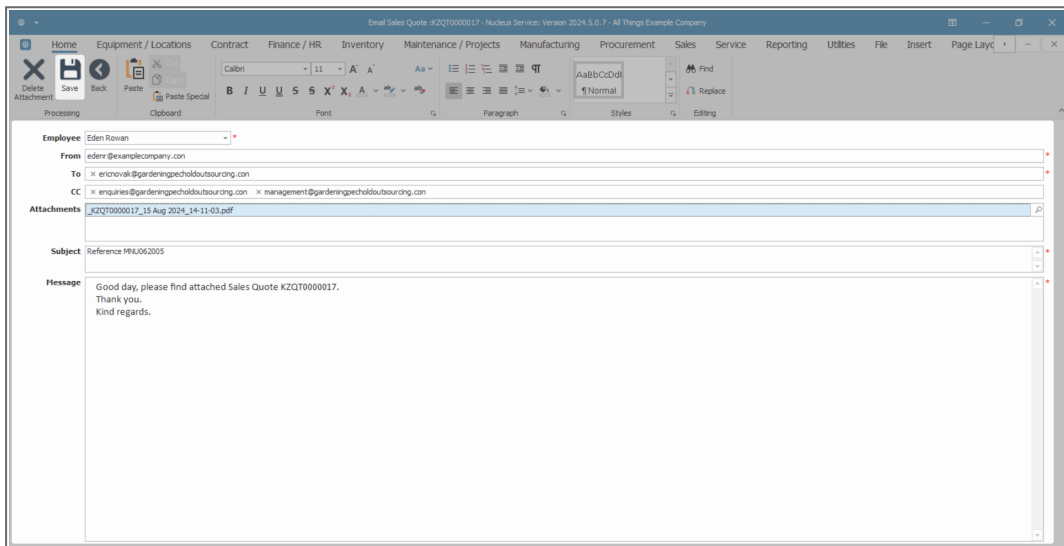


## Email Subject and Message

- **Subject:** Type the subject line for the email. Remember that the subject is the first piece of information the Customer sees.
- **Message:** Type the email body text in the message box.

## SAVE AND SEND EMAIL QUOTE

- Once you have completed your email, click on **Save**.



- The email will be sent from the **server** and you will return to the **Sales Quotes** listing screen.

## Related Topics

- [Add Quote](#)
- [Edit Quote](#)
- [Delete Quote](#)
- [View Quote](#)
- [Accept and Reject a Quote](#)
- [Print and Export a Sales Quote](#)
- [Forward Navigation](#)
- [Apply Project Methodology](#)

- [Clone a Quote](#)
- [Export a Quote](#)
- [Generate a Sales Order](#)
- [Creating a Quote from a Call](#)
- [Creating a Quote from a Project](#)
- [Link Quote Items to a Work Order](#)
- [CRM Basics - Quotes](#)
- [View Quote in CRM](#)
- [Add new Quote in Sales Studio](#)

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