

## QUOTATIONS – REVISIONS/COPYING

When creating a quotation, the program offers the functionality to create a copy as a new quotation or to create a revision of the original quotation.

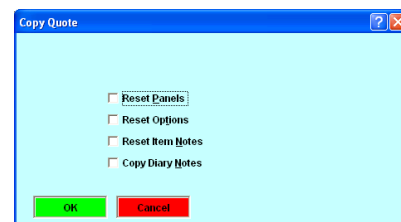
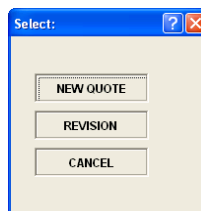
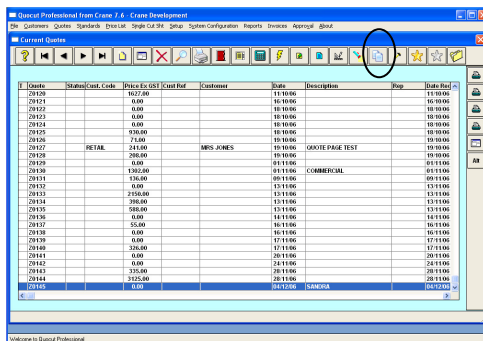
If a revision is chosen the quote number will automatically use the original number and a revision number. A revision can be made of any quotation regardless of whether it is an original or a revision.

**Note - When copying a quotation for either the copy or revision function, all quote items within the quotation will be copied and an option is available to make specific selections to include/exclude various other functions.**

### COPYING A QUOTATION

To copy a quotation as a new quotation for a different customer, or as a revision proceed as follows:

- In the Current Quotes screen highlight the quotation to be copied
- Select the copy icon and make a selection



- Select required options if relevant  
**(Note you will need to select 'Copy Diary Notes' if you want the audit trail and any notes previously created to copy to the new quotation)**
- In the quotation screen make any relevant changes
- In the item screen modify any item as required

**Note: The new revision quotation will keep the original quote number and place a /... after the quote number with the number of the revision – e.g. Z0145/1 or Z0145/2 etc**