

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.

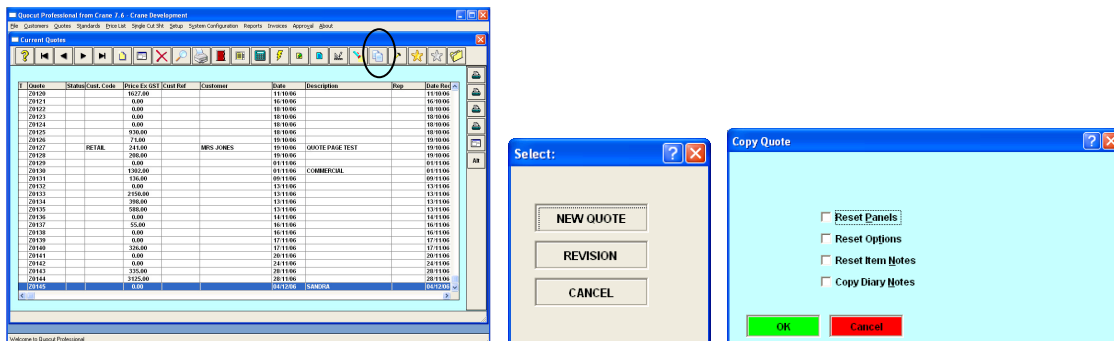
If a revision is chosen the quote number will automatically use the original number and a revision number. A revision can be made of any quotation regardless of whether it is an original or a revision.

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