



13 July 2022

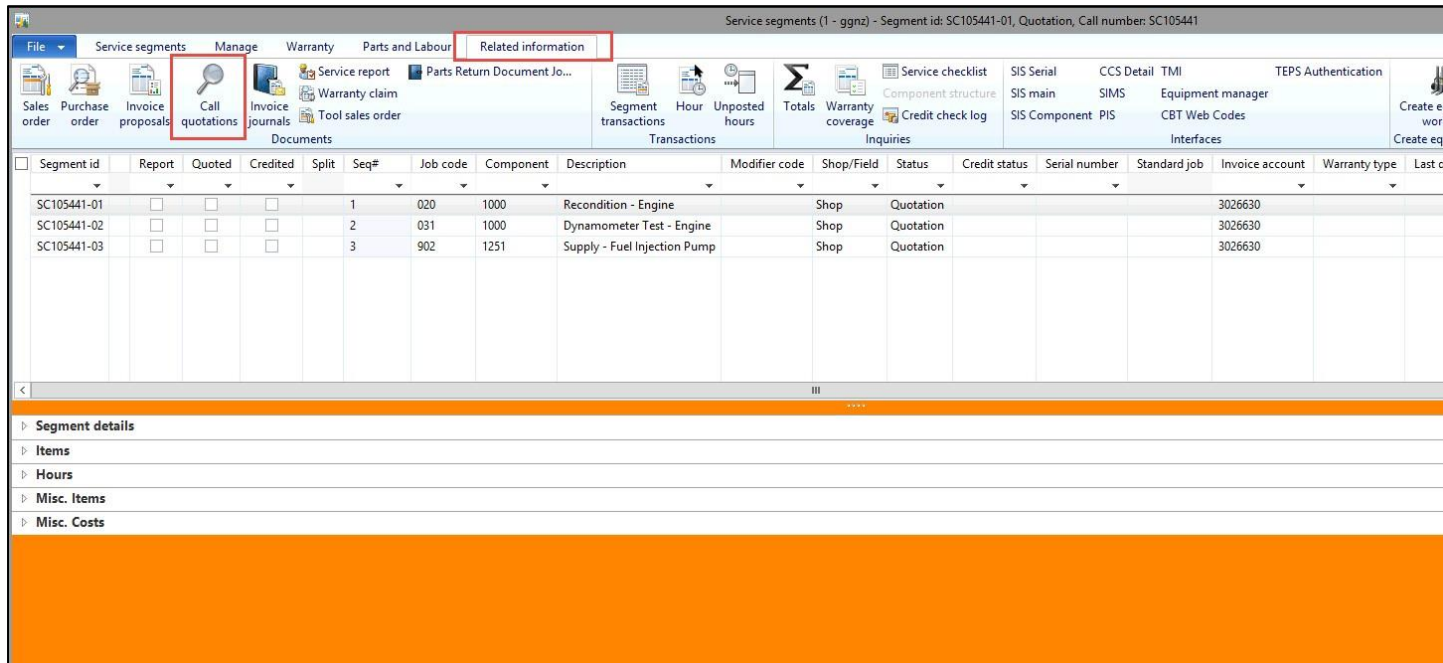
Cancelling Quotations

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Search for the service call then select service segments

Select the segment > related info > call quotations



Service segments (1 - ggnz) - Segment id: SC105441-01, Quotation, Call number: SC105441

File | Service segments | Manage | Warranty | Parts and Labour | **Related information**

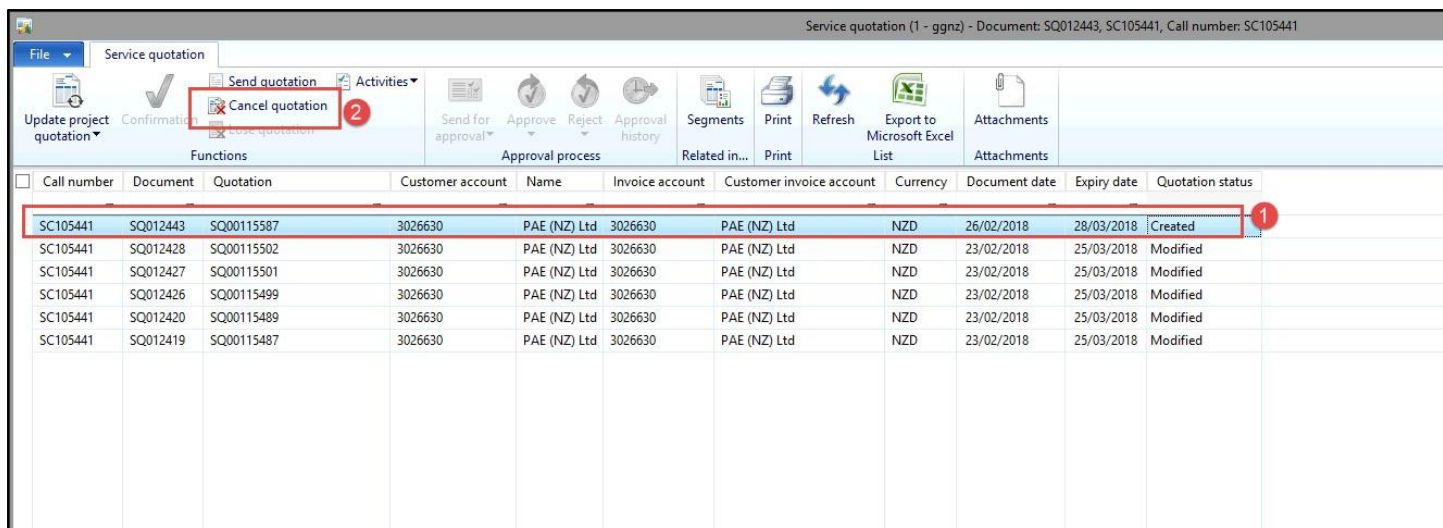
Call quotations (highlighted in red)

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type	Last d
SC105441-01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1	020	1000	Recondition - Engine		Shop	Quotation				3026630		
SC105441-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2	031	1000	Dynamometer Test - Engine		Shop	Quotation				3026630		
SC105441-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	902	1251	Supply - Fuel Injection Pump		Shop	Quotation				3026630		

Segment details

- Items
- Hours
- Misc. Items
- Misc. Costs

Select the quotation that says "created" > cancel quotation



Service quotation (1 - ggnz) - Document: SQ012443, SC105441, Call number: SC105441

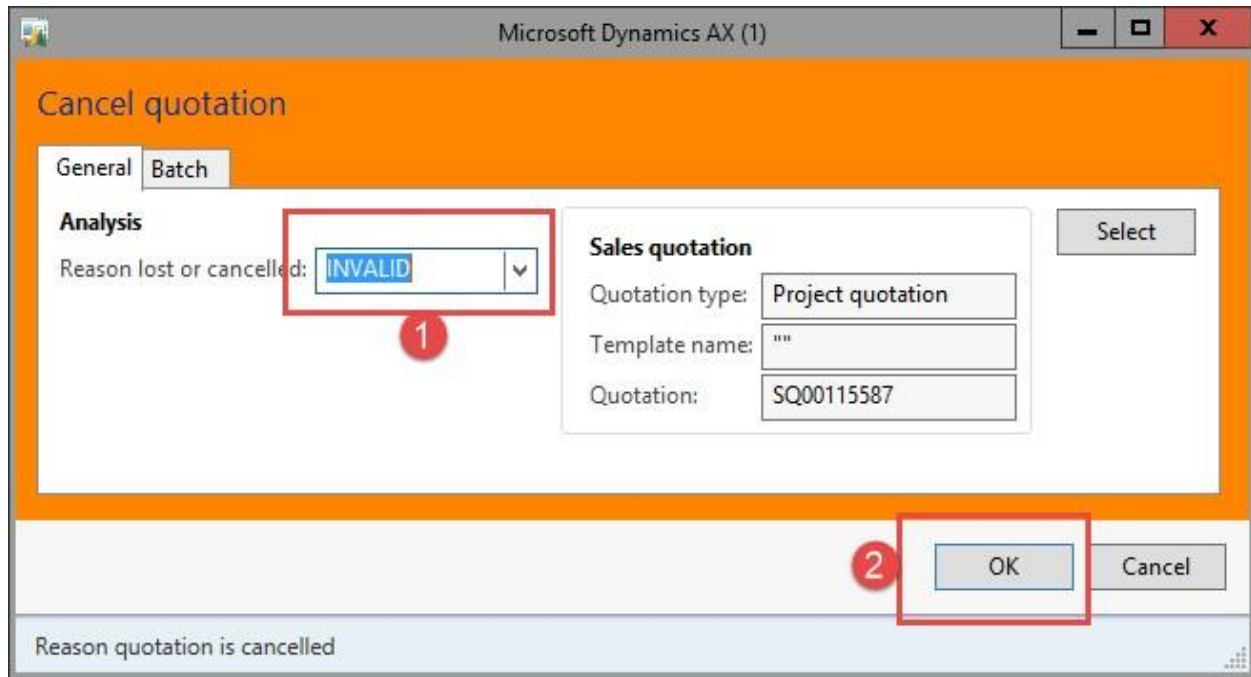
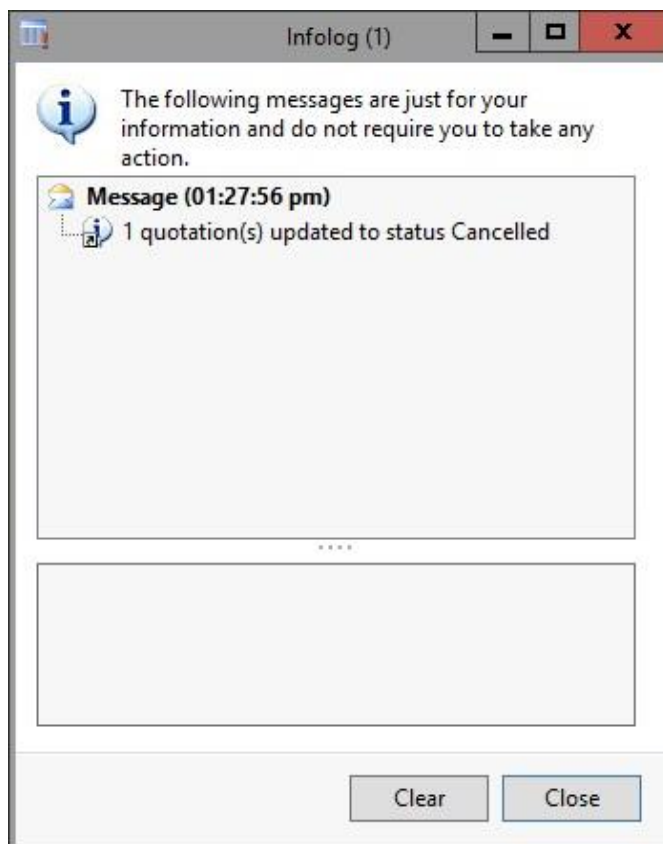
File | Service quotation

Update project quotation | Confirmation | **Cancel quotation** (highlighted in red with a red circle 2) | Activities

Send quotation | Send for approval | Approve | Reject | Approval history | Segments | Print | Refresh | Export to Microsoft Excel | Attachments

Call number	Document	Quotation	Customer account	Name	Invoice account	Customer invoice account	Currency	Document date	Expiry date	Quotation status
SC105441	SQ012443	SQ00115587	3026630	PAE (NZ) Ltd	3026630	PAE (NZ) Ltd	NZD	26/02/2018	28/03/2018	Created
SC105441	SQ012428	SQ00115502	3026630	PAE (NZ) Ltd	3026630	PAE (NZ) Ltd	NZD	23/02/2018	25/03/2018	Modified
SC105441	SQ012427	SQ00115501	3026630	PAE (NZ) Ltd	3026630	PAE (NZ) Ltd	NZD	23/02/2018	25/03/2018	Modified
SC105441	SQ012426	SQ00115499	3026630	PAE (NZ) Ltd	3026630	PAE (NZ) Ltd	NZD	23/02/2018	25/03/2018	Modified
SC105441	SQ012420	SQ00115489	3026630	PAE (NZ) Ltd	3026630	PAE (NZ) Ltd	NZD	23/02/2018	25/03/2018	Modified
SC105441	SQ012419	SQ00115487	3026630	PAE (NZ) Ltd	3026630	PAE (NZ) Ltd	NZD	23/02/2018	25/03/2018	Modified

Put in the reason of “INVALID” > OK

Close the quotation window and go back to the service segments

Expand "Items" > select all lines > select remove

Service segments (1 - ggnz) - Segment id: SC105441-01, Quotation, Call number: SC105441

File Service segments Manage Warranty Parts and Labour Related information

Sales order Purchase order Invoice proposals Call quotations Invoice journals Tool sales order

Service report Warranty claim Parts Return Document Jo...

Segment transactions Hour Unposted hours Totals Warranty coverage

Service checklist Component structure Credit check log

SIS Serial SIS main CCS Detail TMI TEPS Authentication

SIS Component PIS Equipment manager CBT Web Codes

Interfaces

Create new Create e

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type	Last
SC105441-01					1	020	1000	Recondition - Engine		Shop	Quotation				3026630		
SC105441-02					2	031	1000	Dynamometer Test - Engine		Shop	Quotation				3026630		
SC105441-03					3	902	1251	Supply - Fuel Injection Pump		Shop	Quotation				3026630		

Segment details

Items

Add Remove Item transaction Functions Apply marketing program Backorder review Item availability Parts order parameters Delivery information

Item transaction	Warning	SOS	Item number	Estimated Quantity	Line category group	Category	Group number	Qua...	Ship ...	Backordered qty	Product name	Unit	Sales price	Discount percent	Net am
<input checked="" type="checkbox"/>			000 0R5759		ITEM	ITM-STD-REV-TM		1.00		0.00	Reb Turbo G	pc	2,019.92	0.00	2,019.92
<input checked="" type="checkbox"/>			000 0R5759CC		ITEM	ITM-STD-REV-TM		1.00		0.00	Reb Turbo G- Core Ch	pc	485.96	0.00	485.96
<input checked="" type="checkbox"/>			000 4W0435		ITEM	ITM-STD-REV-TM		1.00		0.00	Seal	pc	11.33	0.00	11.33
<input checked="" type="checkbox"/>			000 5M6213		ITEM	ITM-STD-REV-TM		1.00		0.00	Plug	pc	3.55	0.00	3.55
<input checked="" type="checkbox"/>			000 4W4616		ITEM	ITM-STD-REV-TM		1.00		0.00	Seal	pc	7.49	0.00	7.49
<input checked="" type="checkbox"/>			000 6N1016		ITEM	ITM-STD-REV-TM		1.00		0.00	Filler G	pc	218.00	0.00	218.00
<input checked="" type="checkbox"/>			000 0R4812		ITEM	ITM-STD-REV-TM		1.00		0.00	Block Gp	pc	19,023.97	0.00	19,023.97
<input checked="" type="checkbox"/>			000 0R4812CC		ITEM	ITM-STD-REV-TM		1.00		0.00	Block Gp- Core Chg	pc	8,734.90	0.00	8,734.90
<input checked="" type="checkbox"/>			000 9F8999		ITEM	ITM-STD-REV-TM		4.00		0.00	Cap Screw	pc	2.90	0.00	11.60

Hours

Misc. Items

Misc. Costs

Expand “Hours” > select all > select remove

File

Service segments

Manage

Warranty

Parts and Labour

Related information

Sales order

Purchase order

Invoice proposals

Call quotations

Invoice journals

Tool sales order

Service report

Warranty claim

Parts Return Document Jo...

Segment transactions

Hour Transaction

<input type="checkbox"/>	Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description
	SC105441-01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1	020	1000	Recondition - Engine
	SC105441-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2	031	1000	Dynamometer Test - Engi
	SC105441-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	902	1251	Supply - Fuel Injection Pu

Segment details

Items

+ Add

- Remove

Item transaction

Functions

Apply marketing program

Backorder review

Item

<input type="checkbox"/>	Replacement status	Warning	SOS	Item number	Estimated Quantity	Line category group	Category

Hours

+ Add

- Remove

Schedule technician

<input checked="" type="checkbox"/>	Line category group	Estimated duration	Target duration	Resource	Category	Worker
<input checked="" type="checkbox"/>	STANDARD	140:00	00:00		LBR-STD-REV-TM	

Misc. Items

Misc. Costs

Expand “Misc Items” > select all > select remove

File Service segments Manage Warranty Parts and Labour Related information

Sales order Purchase order Invoice proposals Call quotations Invoice journals Service report Warranty claim Parts Return Document Jo... Tool sales order

Segment transactions Hour U Transactions

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description
SC105441-01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1	020	1000	Recondition - Engine
SC105441-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2	031	1000	Dynamometer Test - Engine
SC105441-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	902	1251	Supply - Fuel Injection Pump

< |||

Hours

+ Add - Remove Schedule technician

Line category group	Estimated duration	Target duration	Resource	Category	Worker

< |||

Misc. Items

+ Add - Remove Misc. item transaction Functions Credit OWM Parts order param

Item number	Description	Markup pct	Purchase order	PO status	Quantity	Purchase
<input checked="" type="checkbox"/> OWM A	Clean & Inspect Aftercooler	50.00			1.00	NZD
<input checked="" type="checkbox"/> OWM A	Pressure Test/Clean 3406 Aftercooler	50.00			1.00	NZD
<input checked="" type="checkbox"/> OWM C	2 X EXPORT CRATES FOR SHIPPING	20.00			1.00	NZD
<input checked="" type="checkbox"/> OWM A	PAINT ENGINE	50.00			1.00	NZD

< |||

Misc. Costs

Expand “Misc Costs” > select all > select remove

Service segments (1 - ggr)

File Service segments Manage Warranty Parts and Labour Related information

Sales order Purchase order Invoice proposals Call quotations Invoice journals Service report Parts Return Document Jo... Warranty claim Tool sales order

Documents Transactions

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/P
SC105441-01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1	020	1000	Recondition - Engine		Shop
SC105441-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2	031	1000	Dynamometer Test - Engine		Shop
SC105441-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	902	1251	Supply - Fuel Injection Pump		Shop

Hours

+ Add - Remove Schedule technician

Line category group	Estimated duration	Target duration	Resource	Category	Worker	St

Misc. Items

Add OWM + Add - Remove Misc. item transaction Functions Credit OWM Parts order parameters

Item number	Description	Markup pct	Purchase order	PO status	Quantity	Purchase currency	Purchase price

Misc. Costs

+ Add - Remove Recalculate Freight charge calculati...

Line category group	Category	Line status	Quantity	Description	Unit	Sales price	Cost
<input checked="" type="checkbox"/> WSS	MSC-WSS-REV-TM	New	90.00	Workshop Stock		1.50	
<input checked="" type="checkbox"/> PCL	MSC-PCL-REV-TM	New	50.00	Parts Cleaner		1.00	

Go to the service segments tab > cancel segment

Service segments (1 - ggnz) - Segment id: SC105441-01, Quotation, Call number: SC105441

File Service segments Manage Warranty Parts and Labour Related information

Segment From component structure Edit Delete Equipment disassembly Quotation Start segment Technician complete Finish segment Reopen **Cancel** Create invoice proposals Service call closing summary Operations Add standard job Delivery note Express picking journal Refresh Export to Microsoft Excel Attachments

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type	Last day o
SC105441-01					1	020	1000	Recondition - Engine		Shop	Quotation				3026630		
SC105441-02					2	031	1000	Dynamometer Test - Engine		Shop	Quotation				3026630		
SC105441-03					3	902	1251	Supply - Fuel Injection Pump		Shop	Quotation				3026630		

Hours

Add Remove Schedule technician

Line category group	Estimated duration	Target duration	Resource	Category	Worker	Start date	Start time	End date	End time	Sales price	Cost price	Net amount	Curre
This grid is empty.													

Misc. Items

Add OWM Add Remove Misc. item transaction Functions Credit OWM Parts order parameters

Item number	Description	Markup pct	Purchase order	PO status	Quantity	Purchase currency	Purchase price	Currency	Cost price	Sales price	Net amount	Freeze price	Warehouse	Need by date	Exclude from
This grid is empty.															

Misc. Costs

Add Remove Recalculate Freight charge calculati...

Line category group	Category	Line status	Quantity	Description	Unit	Sales price	Cost price	Net amount	Currency	Line property	Worker	Item GST group
This grid is empty.												

Description for the transaction

Repeat the above steps for EACH segment on EACH service call