

## Sales – Quote Payment Claim (Add – Edit)

This article describes how to Add or Edit a Customer Quote Payment Claim. If a Works has an Accepted Quote, the Add Sales button will display as an Add Payment Claim button.


**NOTE:** Before you can enter a Quote Payment Claim, the Customer must be entered in Contacts, for more information see KAT-0310

### To Add or Edit a Quote Payment Claim;

Adding or Editing a Quote Payment Claim is done from the SALES Subnav of a Works OR the SALES Tab. Added Quote Payment Claims display in the SALES Tab and Works > SALES Subnav.

### Quick Flow;

**WORKS** Window > **SALES** Subnav > **[Add Sales]** OR **SALES** Tab > **[Add]** > **Works Reference** > **Enter** > **Check Payment Claim Details** > **CLAIM TO DATE % OR \$** > **[Save]**

1. From a **WORKS** Window scroll down and Press on the **SALES** Subnav to expand, then Press on the **[Add Payment Claim]** button  to display the PAYMENT CLAIM: NEW Window. Go to step 3.

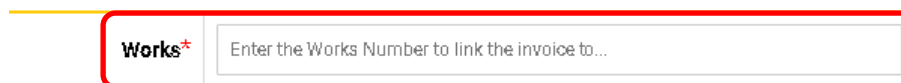


OR

1. Press on the **SALES** Tab to display the SALES Library, then Press on the **[Add]** button  to display the SALE: NEW Window



2. From the SALE: NEW Window Enter a **Works Reference** into the Works\* field, then Press **Enter**.



The image shows a text input field labeled 'Works\*' with a red border. The placeholder text reads 'Enter the Works Number to link the invoice to...'


3. From the PAYMENT CLAIM: NEW Window **Check Payment Claim Details**, Enter / Edit as required;
  - “Billing Address”
  - “Billing Contact\*”
  - “Job Address”
  - “Job Description”
  - “Customer Reference”
  - “Date\*”
  - “Payment Claim From\*” > “Payment Claim To\*” Dates
  - “Due Date\*”, this should auto populate using the Customer’s Default Payment Terms

4. From the PAYMENT CLAIM LINES Section, Enter in either a **CLAIM TO DATE %** OR **CLAIM TO DATE \$** Value for any displaying Quote Sections OR Variation Lines

PRICE	QTY	TOTAL PRICE	CLAIM TO DATE %	CLAIM TO DATE \$
\$1638.90	1	\$1,638.90	% 0	\$ 0.00

**NOTE:** Enter the % OR \$ Value to the full value of the Payment Claim you want to make. Not the % OR \$ Value you want to increase the Payment Claim by.

**Temporary Procedural Step:** “Less Retentions” is a manual entry field until the Retention field is automated

5. Press on the **[Save]** button  and select an option to save the Quote Payment Claim
- [SAVE AS DRAFT] – You can continue editing at a later time
  - [SAVE & LOCK] – Locks your Quote Payment Claim, and if you have a valid Xero connection, sends the Quote Payment Claim to Xero

Once saved the PRINT PREVIEW Subnav displays where you can view the Quote Payment Claim PDF, Press on the PRINT PREVIEW Subnav to expand and view the Quote Payment Claim PDF



**NOTE:** Form the PDF Window you can Download or Print the Quote Payment Claim using the PDF Window functionality

Pressing on the [Email] button  of the PRINT PREVIEW Subnav allows you to email the Quote Payment Claim.