

CRM BASICS

ADDING / EDITING / DELETING QUOTES

Adding Quotes in CRM, will also create the **quote in BPO** as a **New Quote**.

This new quote will need to be **emailed to the client**. This email include links to either:

- **Accept** or
- **Reject** the Quote

or to have the salesman:

- **Contact Me**

regarding the Quote.

Once Accepted (or Rejected), a quote can no longer be edited.

-



UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.



Quotes can be added when: **creating a new case or editing a case** , **adding or editing an activity**, or from the **Customer-specific Cases** listing page and the **Customer-specific Activities** listing page.

ADD A NEW QUOTE WHEN CREATING A CASE...??



UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.

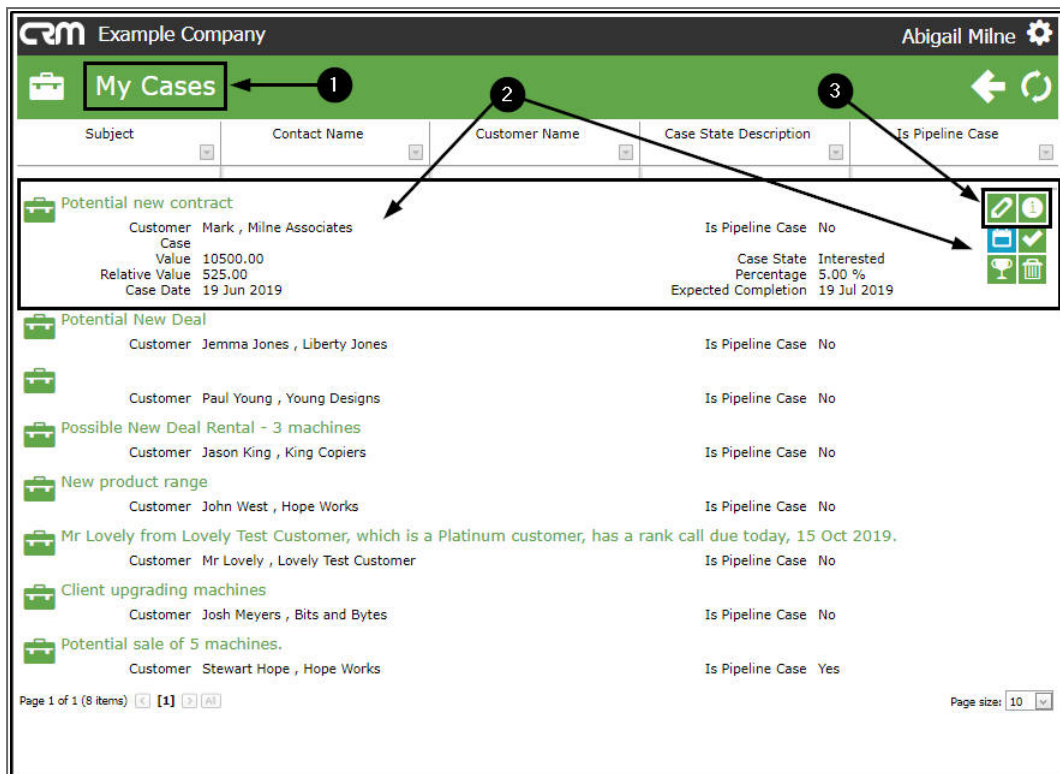


ADD A NEW QUOTE WHEN EDITING A CASE

1. In the Dashboard,
2. Click on the Cases tile.



1. The **My Cases** page will open.
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on either the **View Case Info and History** button or the **View/Edit this Case** button.
 - (Either of these buttons will direct you to the Save Case page where you can add a new quote.)



The screenshot shows the 'My Cases' page in a CRM system. The page has a green header bar with the 'My Cases' tab selected. Below the header is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. The first row is expanded, showing details for 'Potential new contract'.

Numbered callouts indicate the following actions:

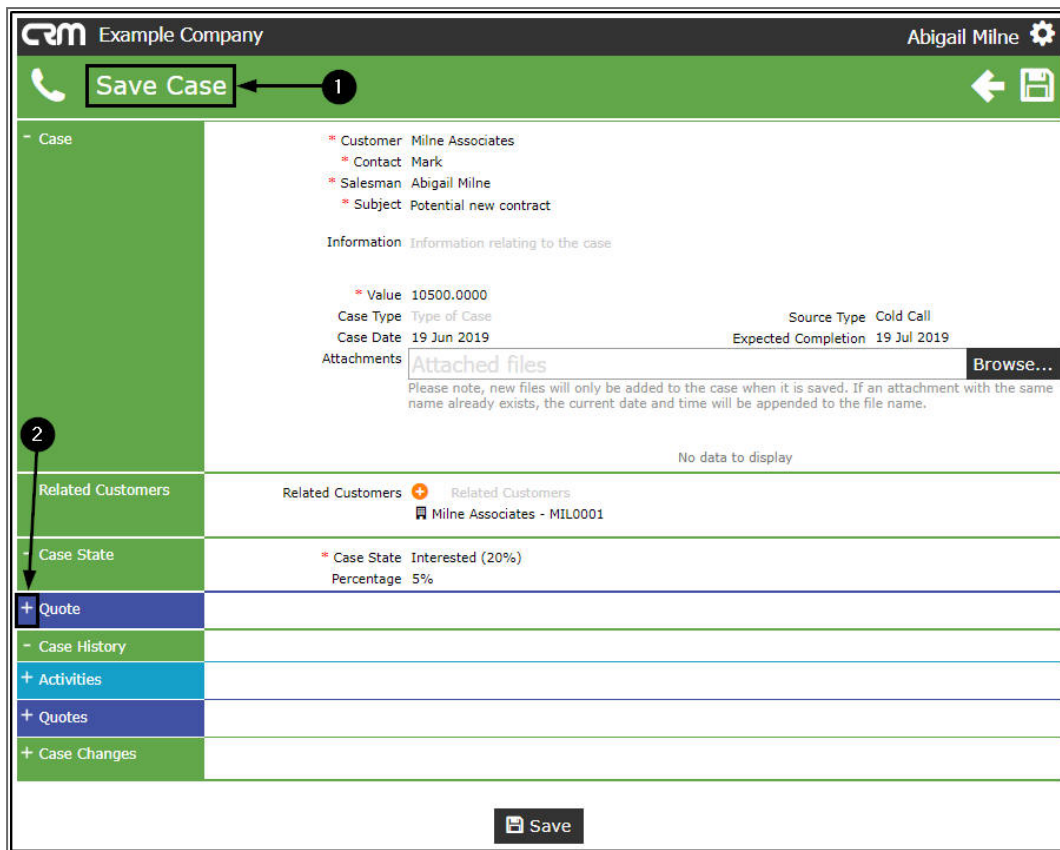
- 1: Click on the 'My Cases' tab.
- 2: Click on the 'Customer Name' column header.
- 3: Click on the 'Is Pipeline Case' column header.

The expanded row for 'Potential new contract' shows the following details:

Field	Value	Field	Value
Customer	Mark, Milne Associates	Is Pipeline Case	No
Case Value	10500.00	Case State	Interested
Relative Value	525.00	Percentage	5.00 %
Case Date	19 Jun 2019	Expected Completion	19 Jul 2019

Below the expanded row, there are several other cases listed, each with a brief description and customer name. The page footer shows 'Page 1 of 1 (8 items)' and a 'Page size' dropdown set to 10.

1. The **Save Case** page will open.
2. Expand the **Quote** frame.



CRM Example Company Abigail Milne

Save Case 1

Case 2

* Customer Milne Associates
 * Contact Mark
 * Salesman Abigail Milne
 * Subject Potential new contract

Information Information relating to the case

* Value 10500.0000
 Case Type Type of Case
 Case Date 19 Jun 2019 Source Type Cold Call
 Expected Completion 19 Jul 2019

Attachments Attached files Browse...
 Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers
 Related Customers + Related Customers
 Milne Associates - MIL0001

* Case State Interested (20%)
 Percentage 5%

+ Quote

- Case History

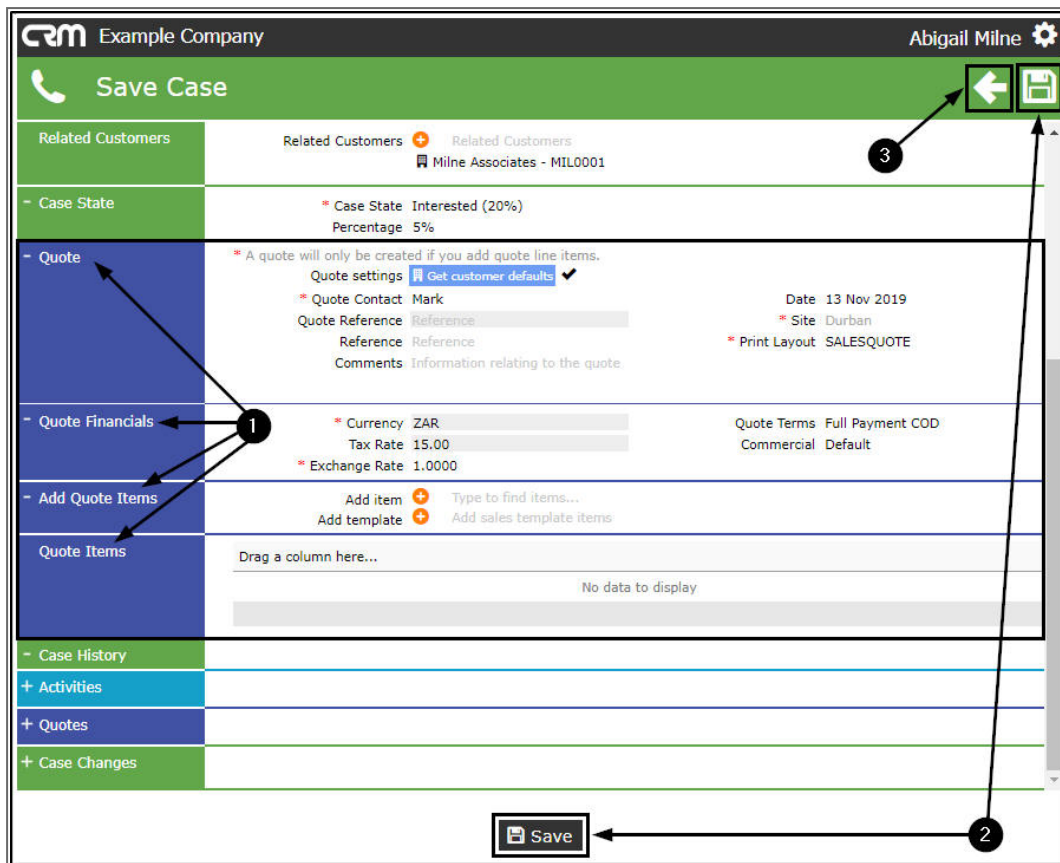
+ Activities

+ Quotes

+ Case Changes

Save

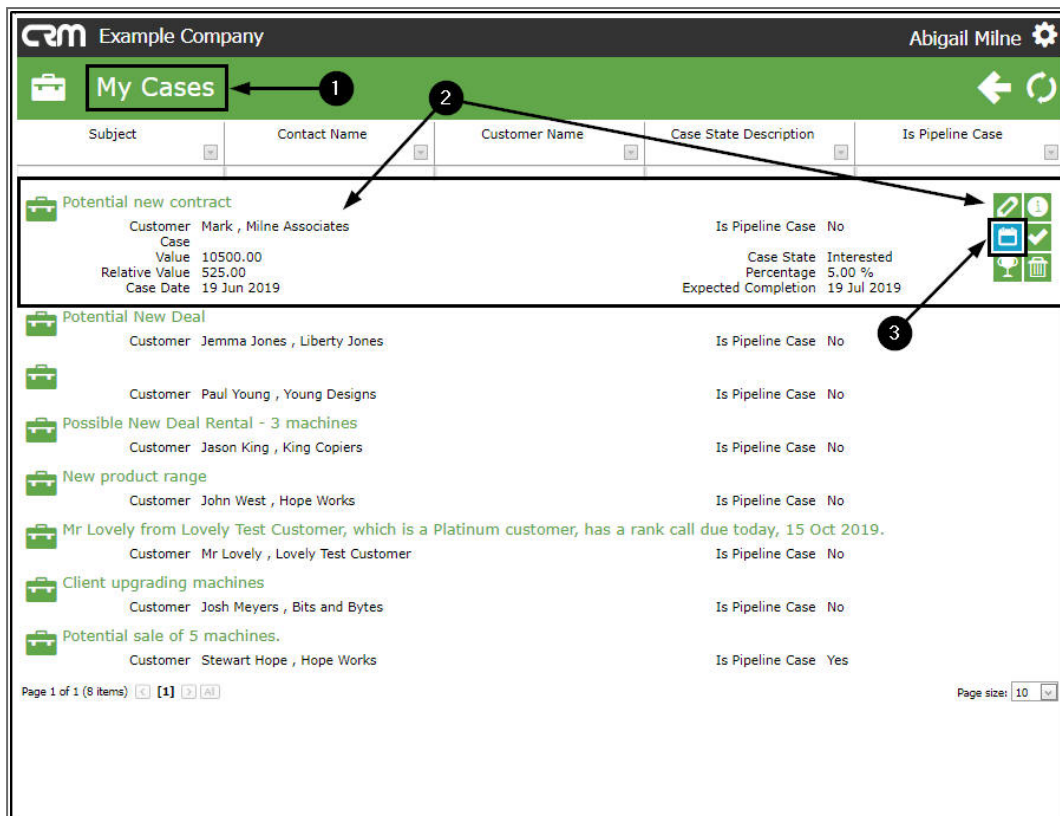
1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.



The screenshot shows the 'Save Case' form in a CRM system. The form is titled 'Save Case' and has a green header bar. The user 'Abigail Milne' is logged in. The form contains several sections: 'Related Customers', 'Case State', 'Quote', 'Quote Financials', 'Add Quote Items', 'Quote Items', 'Case History', 'Activities', 'Quotes', and 'Case Changes'. The 'Quote' section is expanded, showing fields for 'Quote settings', 'Quote Contact', 'Quote Reference', 'Reference', 'Comments', 'Date', 'Site', and 'Print Layout'. The 'Quote Financials' section is also expanded, showing fields for 'Currency', 'Tax Rate', 'Exchange Rate', and 'Quote Terms'. The 'Add Quote Items' section has buttons for 'Add item' and 'Add template'. The 'Quote Items' section is empty. The 'Case History' section shows a list of activities. The 'Activities' section is empty. The 'Quotes' section is empty. The 'Case Changes' section is empty. There are three numbered callouts: 1 points to the 'Quote' section, 2 points to the 'Save' button at the bottom, and 3 points to the 'New Activity' button in the top right corner.

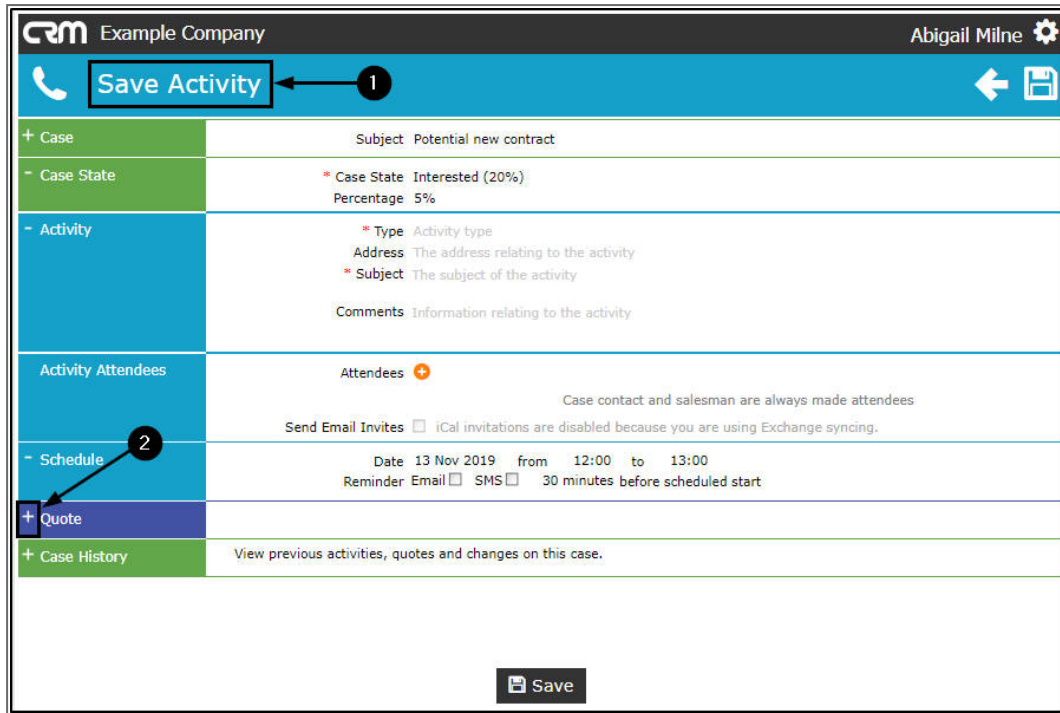
LINK A QUOTE TO AN ACTIVITY IN A CASE

1. In the **My Cases** page,
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on the **New Activity** button.

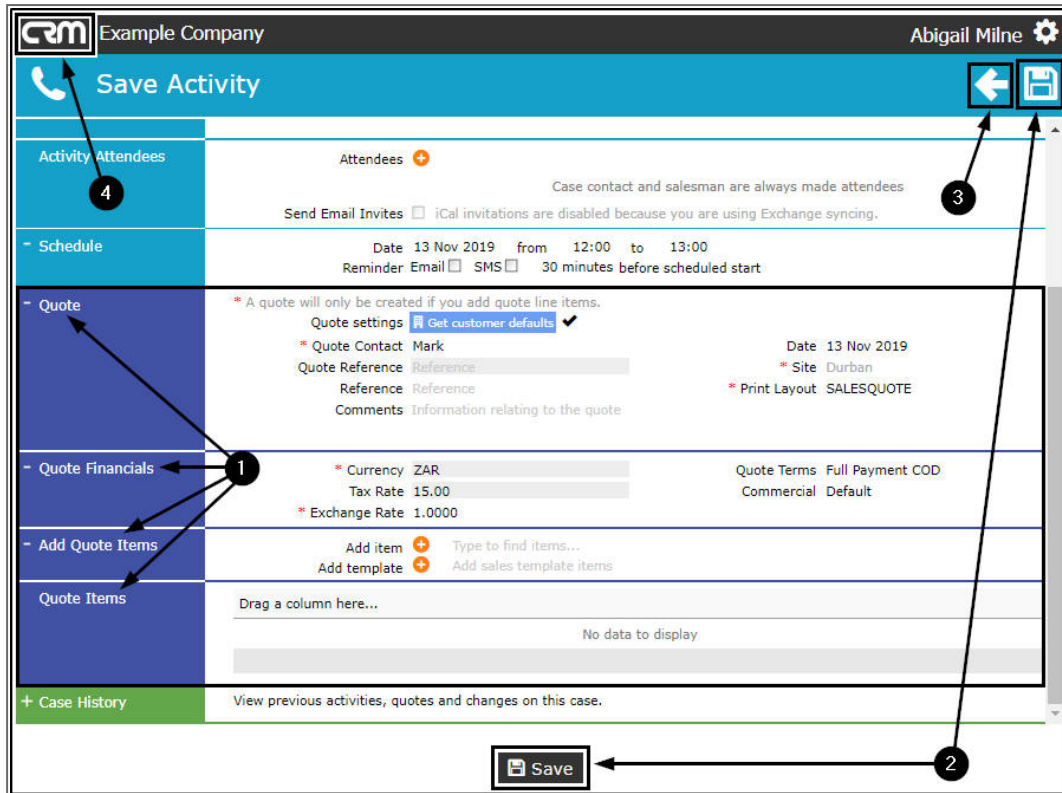


The screenshot shows the 'My Cases' page in a CRM system. The header includes the company name 'Example Company' and the user 'Abigail Milne'. The page has a green header bar with a 'My Cases' button (callout 1) and a refresh icon. Below the header is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. The first row is expanded, showing details for 'Potential new contract' (callout 2). The details include Customer (Mark, Milne Associates), Case Value (10500.00), Relative Value (525.00), Case Date (19 Jun 2019), Case State (Interested), Percentage (5.00 %), and Expected Completion (19 Jul 2019). To the right of the details is a toolbar with icons for edit, delete, and other actions (callout 3). The table lists several other cases, including 'Potential New Deal', 'Possible New Deal Rental - 3 machines', 'New product range', 'Mr Lovely from Lovely Test Customer', 'Client upgrading machines', and 'Potential sale of 5 machines'. The footer shows 'Page 1 of 1 (8 items)' and a 'Page size' dropdown set to 10.

1. The **Save Activity** page will open.
2. Expand the **Quote** frame.



1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).



The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: 'Activity Attendees', 'Schedule', 'Quote', 'Quote Financials', 'Add Quote Items', 'Quote Items', and 'Case History'. The 'Quote' section is highlighted in blue. The 'Quote Financials' section contains fields for Currency (ZAR), Tax Rate (15.00), and Exchange Rate (1.0000). The 'Add Quote Items' section has buttons for 'Add item' and 'Add template'. The 'Quote Items' section is empty. The 'Case History' section shows a list of previous activities. The form is titled 'Save Activity' and has a 'Save' button at the bottom right. The user's name 'Abigail Milne' is in the top right corner. The company name 'Example Company' is in the top left corner. The form is numbered 1 through 4: 1 points to the 'Quote Financials' section, 2 points to the 'Save' button, 3 points to the 'Quote' section, and 4 points to the 'Activity Attendees' section.

LINK A QUOTE WHEN EDITING AN ACTIVITY

1. In the *Dashboard*,
2. Click on the *Activities* tile.



CRM Example Company Abigail Milne

Dashboard (1) Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	2	1
Meeting	20	0	2
On Site Inspection	20	1	0
Site inspection	2	0	0

1 Month Performance

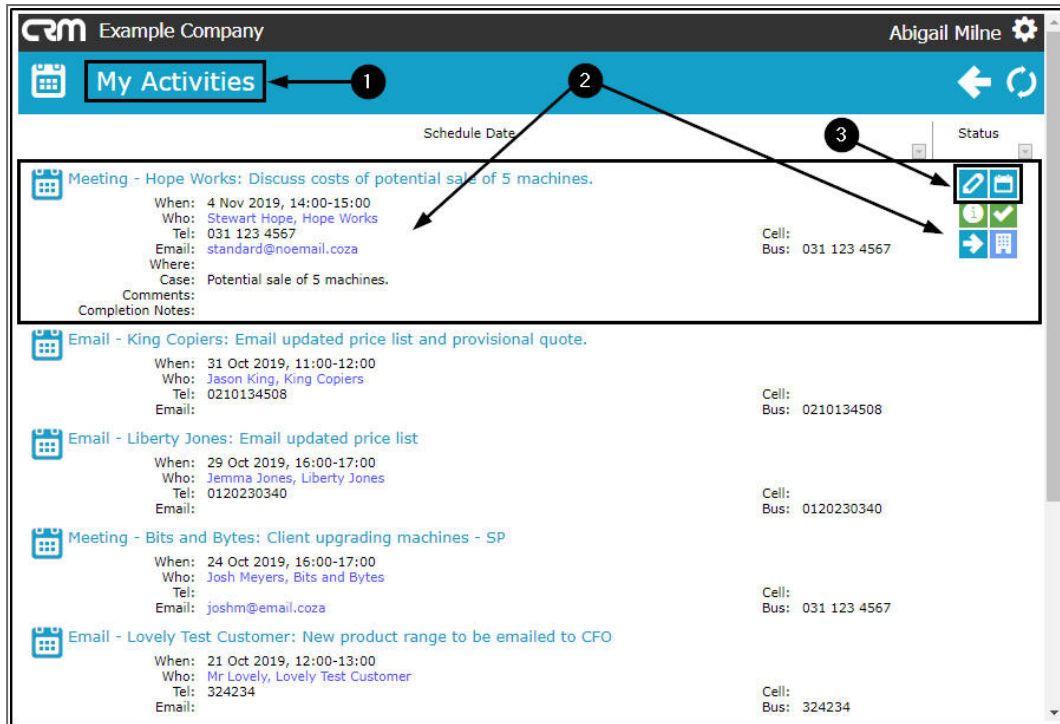
4 Month Pipeline

Activities Grid:

- create cold call (15 Oct 2019, 19)
- recommendations (19)
- warnings (9)
- customers (75)
- cases (8)
- activities (7)** (2)
- quotes (13)
- equipment (147)
- 3rd party (8)

Footer: ©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0) CO3 TECHNOLOGIES

1. The **My Activities** page will open.
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on either the **View/Edit this Activity** button or the **Reschedule this Activity** button.
 - (Either of these buttons will direct you to the Save Activity page where you can add a new quote.)



CRM Example Company Abigail Milne

My Activities

Schedule Date Status

Meeting - Hope Works: Discuss costs of potential sale of 5 machines.

When: 4 Nov 2019, 14:00-15:00
 Who: Stewart Hope, Hope Works
 Tel: 031 123 4567
 Email: standard@noemail.coza
 Where:
 Case: Potential sale of 5 machines.
 Comments:
 Completion Notes:

Cell: 031 123 4567
 Bus: 031 123 4567

Email - King Copiers: Email updated price list and provisional quote.

When: 31 Oct 2019, 11:00-12:00
 Who: Jason King, King Copiers
 Tel: 0210134508
 Email:

Cell: 0210134508
 Bus: 0210134508

Email - Liberty Jones: Email updated price list

When: 29 Oct 2019, 16:00-17:00
 Who: Jemma Jones, Liberty Jones
 Tel: 0120230340
 Email:

Cell: 0120230340
 Bus: 0120230340

Meeting - Bits and Bytes: Client upgrading machines - SP

When: 24 Oct 2019, 16:00-17:00
 Who: Josh Meyers, Bits and Bytes
 Tel:
 Email: joshm@email.coza

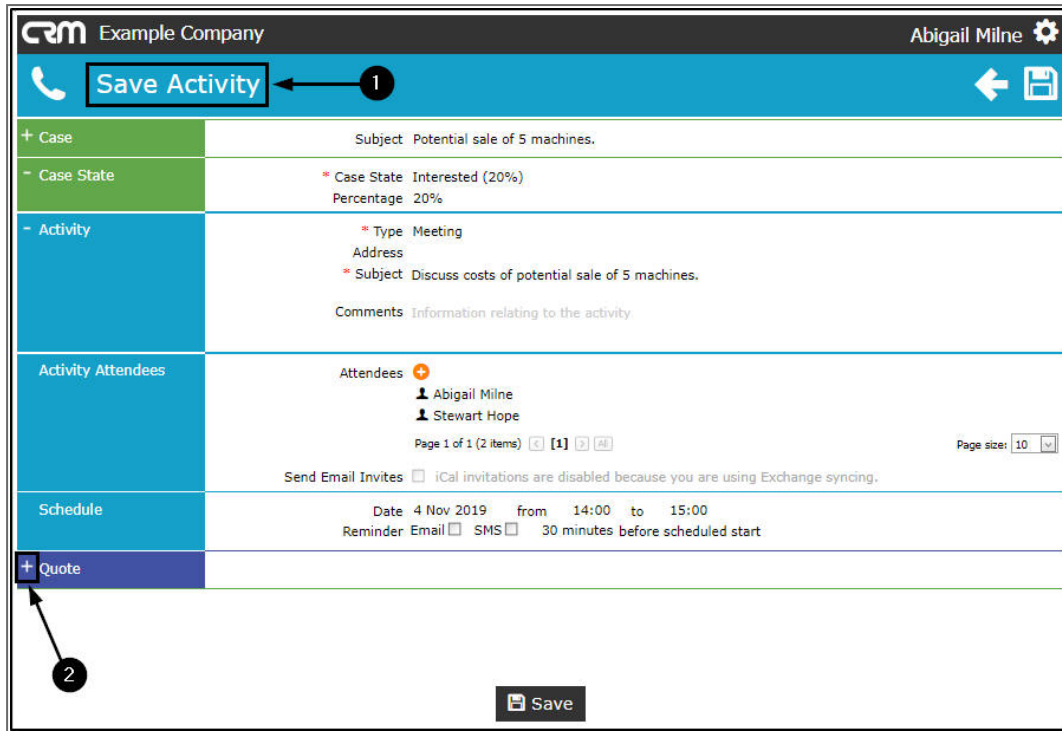
Cell: 031 123 4567
 Bus: 031 123 4567

Email - Lovely Test Customer: New product range to be emailed to CFO

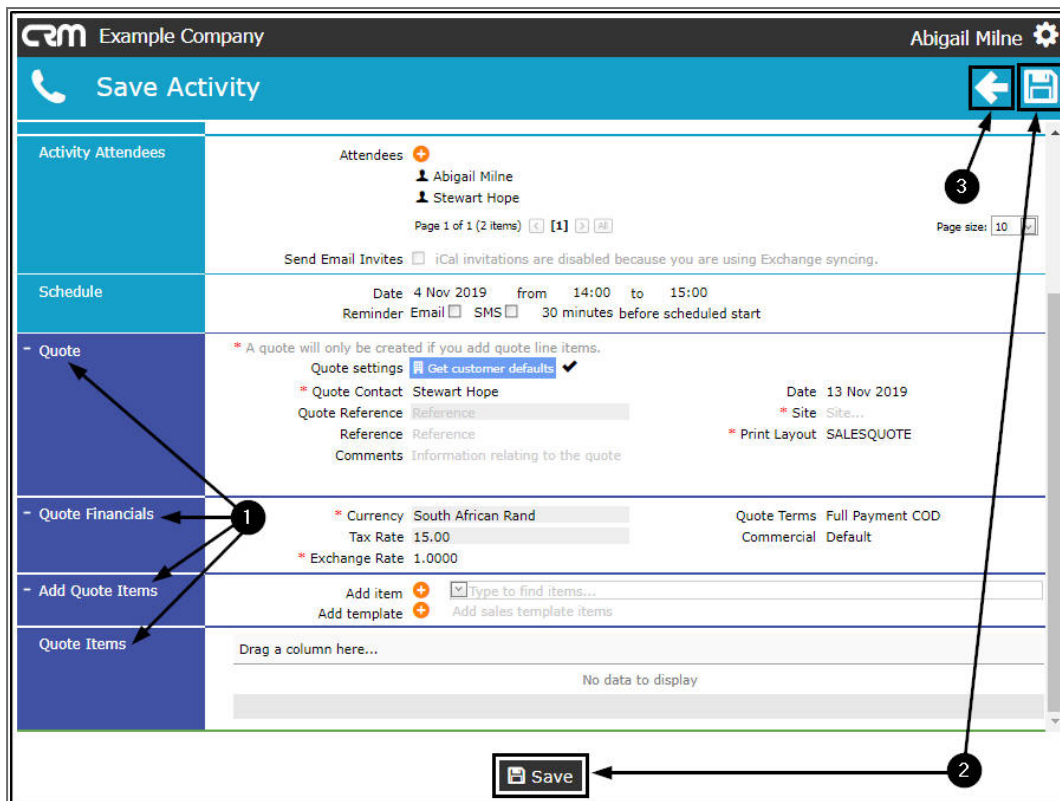
When: 21 Oct 2019, 12:00-13:00
 Who: Mr Lovely, Lovely Test Customer
 Tel: 324234
 Email:

Cell: 324234
 Bus: 324234

1. The **Save Activity** page will open.
2. Expand the **Quote** frame.



1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Activities Screen.



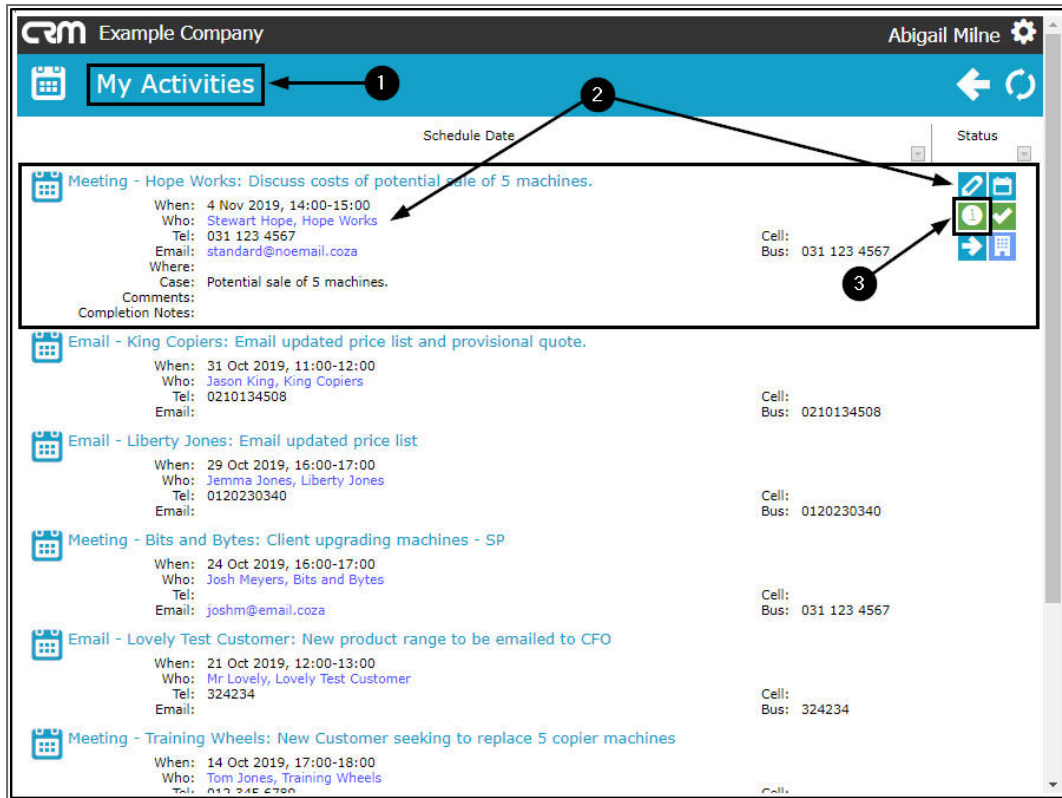
The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: 'Activity Attendees', 'Schedule', 'Quote', 'Quote Financials', 'Add Quote Items', and 'Quote Items'. Annotations are placed on the form:

- Annotation 1:** Points to the 'Quote' section, specifically to the 'Quote settings' area.
- Annotation 2:** Points to the 'Save' button at the bottom of the form.
- Annotation 3:** Points to the 'View Case Info and History' button (represented by a magnifying glass icon) in the top right corner of the form.

The form contains the following data:

- Activity Attendees:** Attendees: Abigail Milne, Stewart Hope. Page 1 of 1 (2 items).
- Schedule:** Date: 4 Nov 2019, from 14:00 to 15:00. Reminder Email: SMS 30 minutes before scheduled start.
- Quote:**
 - Quote settings: Get customer defaults (checked).
 - Quote Contact: Stewart Hope.
 - Quote Reference: Reference.
 - Comments: Information relating to the quote.
 - Date: 13 Nov 2019.
 - Site: Site...
 - Print Layout: SALESQUOTE.
- Quote Financials:**
 - Currency: South African Rand.
 - Tax Rate: 15.00.
 - Exchange Rate: 1.0000.
 - Quote Terms: Full Payment COD.
 - Commercial: Default.
- Add Quote Items:**
 - Add item: Type to find items...
 - Add template: Add sales template items.
- Quote Items:** Drag a column here... No data to display.

1. In the **My Activities** page,
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on the **View Case Info and History** button.



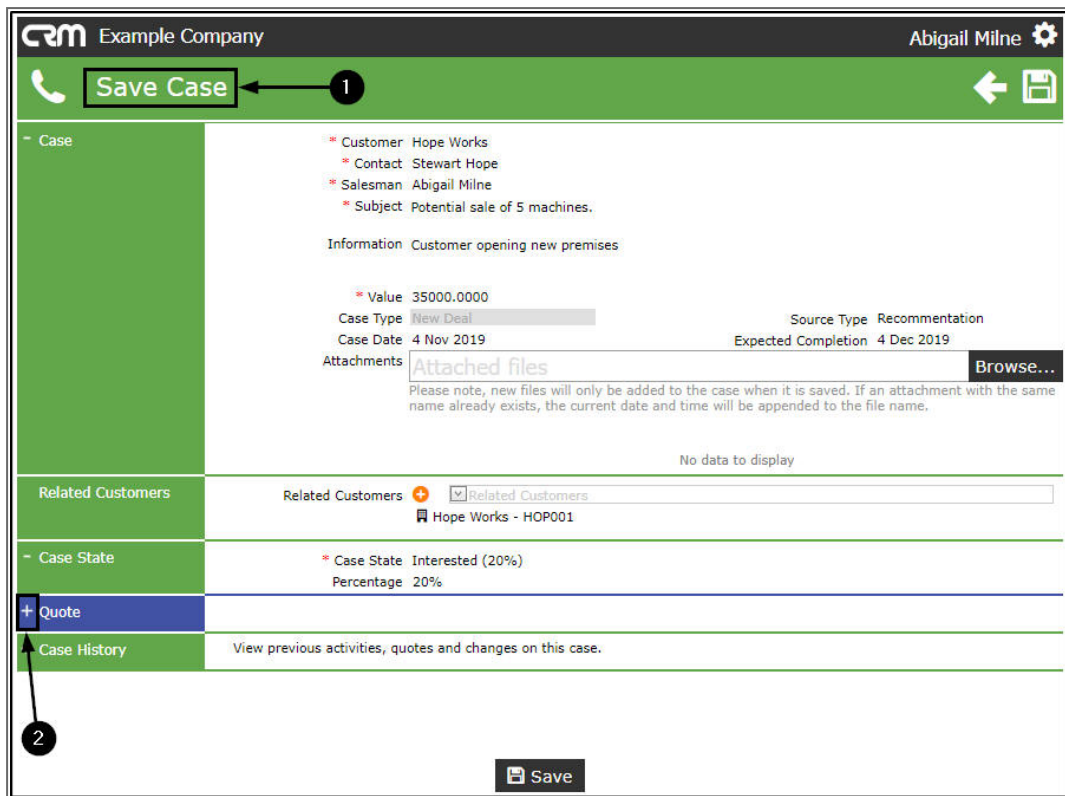
The screenshot shows the 'My Activities' page in a CRM system. The page header includes the company name 'Example Company' and the user 'Abigail Milne'. The main content area lists several activities, each with details like 'When', 'Who', 'Tel', 'Email', 'Where', 'Case', 'Comments', and 'Completion Notes'. Annotations are placed on the screenshot:

- Annotation 1 points to the 'My Activities' header.
- Annotation 2 points to the 'Schedule Date' column header.
- Annotation 3 points to the 'Status' column header.

The activities listed are:

- Meeting - Hope Works: Discuss costs of potential sale of 5 machines.
- Email - King Copiers: Email updated price list and provisional quote.
- Email - Liberty Jones: Email updated price list.
- Meeting - Bits and Bytes: Client upgrading machines - SP.
- Email - Lovely Test Customer: New product range to be emailed to CFO.
- Meeting - Training Wheels: New Customer seeking to replace 5 copier machines.

1. The **Save Case** page will open.
2. Expand the **Quote** frame.



CRM Example Company Abigail Milne

Save Case 1

Case

- * Customer Hope Works
- * Contact Stewart Hope
- * Salesman Abigail Milne
- * Subject Potential sale of 5 machines.

Information Customer opening new premises

* Value 35000.0000

Case Type New Deal Source Type Recommendation

Case Date 4 Nov 2019 Expected Completion 4 Dec 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Related Customers

Hope Works - HOP001

Case State

- * Case State Interested (20%)
- Percentage 20%

+ Quote

Case History View previous activities, quotes and changes on this case.

2

Save

1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).


Example Company

Abigail Milne



Save Case




4

No data to display

Related Customers

Related Customers

Related Customers
 Hope Works - HOP001

- Case State

* Case State Interested (20%)
Percentage 20%

- Quote

* A quote will only be created if you add quote line items.
Quote settings  Get customer defaults ✓
* Quote Contact Stewart Hope
Quote Reference
Reference
Comments Information relating to the quote.
Date 13 Nov 2019
* Site
* Print Layout SALESQUOTE

- Quote Financials

* Currency South African Rand
Tax Rate 15.00
* Exchange Rate 1.0000
Quote Terms Full Payment COD
Commercial Default

+ Add Quote Items

Quote Items

Drag a column here...
No data to display

+ Case History

View previous activities, quotes and changes on this case.

Save

2

LINK A QUOTE FROM CUSTOMER DASHBOARD WHEN EDITING A CASE

Save Quote

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localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

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Save Quote

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+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

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localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

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Save Quote

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+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Expand the 'Quote Financials' section to view the customer's currency, tax rate and exchange rate.
- This section also includes the ' **Quote Terms** ' - this is the quote repayment factor and should be configured in Static Rights ([Sales Quote Repayment Method](#)).
- Select the terms as required for this quote.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

- Quote Financials

* Currency

Tax Rate

* Exchange Rate

Quote Terms

Commercial

Payments	Payment Period
1	Full Payment COD
12	12 Months
6	6 Months

- Quote Items

Add item

Add template

Drag a column here...

No data to display

Save

Help v2.5.0.14 - Pg 26 - Printed: 25/06/2024

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- You now have the ability to **add single items** to a quote (with or without also using quote templates).
- **Note:** For Part Numbers to pull through to this list - you need to ensure that the Quote Products are specified.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

Type	Code	Description	#
INN	SP2020	SP2020 Sprint Colour M	1
INN	2020-147X	Black toner SP2020	2
INN	SP19-147Y	Yellow Toner - SP1919	6
INN	SP19-147M	Magenta toner - SP1915	7
INN	2020-147M	Magenta toner SP2020	8
INN	2020-147C	Cyan toner SP2020	9
INN	CL-100-965	Cleaner	11

💾 Save

- Type in the text field to filter on the Code and Description lines.
- Click on the item you want to add

Save Quote

[←](#)
[→](#)
[↺](#)

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

A quote will only be created if you add quote line items.

Customer Hope Works

Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item SP2020

Add template

Drag a column here...

Type	Code	Description	#
INN	SP2020	SP2020 Sprint Colour Mt	1
INN	2020-147K	Black toner SP2020	2
INN	2020-147M	Magenta toner SP2020	8
INN	2020-147C	Cyan toner SP2020	9
INN	2020-147L	SP2020 Clear Toner	24
INN	2020-147Y	Yellow toner SP2020	10
INN	20-753	SP2020 Fuser Unit	64

Save

- Click on the 'Add Item' button

Save Quote

localhost:50000/bpocm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote

+ Case

Subject New machine - test case

- Quote

A quote will only be created if you add quote line items.

Customer Hope Works

Quote Contact Jane Alrich

Quote Reference Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020

Add template Add sales template items

Drag a column here...

No data to display

Save

- The item will be added to the Quote Line Items sections

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template Add sales template items

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
				12250.00	9500.00	0.00	9500.00	10830.00

Save

- To add Sales Templates: click on the 'Add Quote Template Items' dropdown
- You could also type into the text box to filter for the template you need
- Click on the template required.
- Link the templates items by clicking on the 'Add Items' button

Save Quote

localhost:5000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

A quote will only be created if you add quote line items.

Customer Hope Works

Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add Item INVN | SP2020 | SP2020 Sp

Add template

Actions	Item Type	Item Name	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP1020 Standard Package	12250.00	9500.00		9500.00	10830.00
			12250.00	9500.00	0.00	9500.00	10830.00

Save

- You can **edit a line** item, by clicking on the 'Edit' button on that line.

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.
 	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.
 	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.
 	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.
 	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.

Save

- The quote item edit section will come up.
- Make the changes required.
- Click on 'Update' to view the changes in the quote.
- Click on 'Done' when you have completed all the changes.

Save Quote

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localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

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Save Quote

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Case

Subject New machine - test case

Quote

⚠️ A quote will only be created if you add quote line items.

⚠️ Customer Hope Works

⚠️ Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

⚠️ Print Layout SALESQUOTE

Quote Financials

Quote Items

Add Item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00

Quote Item Description

SP2020 Sprint

Quantity 1

Unit Cost 12250.000000

Item Price 9500.00

Update Done

🗑️	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
🗑️	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
🗑️	INVN	1020-1476	1	350.00	403.50	403.50	403.50	450.00

Save

- Click on the 'delete' button to remove line items from the quote.

Save Quote

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Save Quote

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Case

Subject New machine - test case

Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

* Print Layout SALESQUOTE

Quote Financials

Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
 	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
 	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
 	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.85
 	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.00

Save

- *Note: A new Quote Terms method can be selected, which will reapply the 'Repayment Amount per Period'*

Save Quote

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Save Quote

Case

Subject New machine - test case

Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

Quote Financials

* Currency Quote Terms

Tax Rate 14.00 Commercial Default

* Exchange Rate 1.0000

Quote Items

Add item INVN | SP2020 | SP2020 Sp +

Add template SP1020 Standard Package +

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

- Make sure you 'Save' once you are done.

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

Case

Subject New machine - test case

Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

Quote Financials

* Currency South African Rand Quote Terms 12 Months

Tax Rate 14.00 Commercial Default

* Exchange Rate 1.0000

Quote Items

Add Item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

See Also:

- [View / Print / Email the Quote](#)

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