

## CRM BASICS

### QUOTES (SALESMAN-SPECIFIC)

A full list of **New**, **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, can be accessed from the **Dashboard** (Home Page) as set out below.

Customer-specific Quotes can be accessed from the **Customer Dashboard** (Customer Page).

Adding Quotes in **CRM**, will also create the quote in **BPO** as a New Quote. This Quote needs to be emailed to the client. The email include links to either:

- 'Accept' or
- 'Reject' the Quote,
- or to have the salesman 'Contact Me'

Once '**Accepted**' a Quote can no longer be edited.

Quotes can be added when

- creating a new Case or
- editing a Case
- adding or editing an Activity
- or from the Case and Activity lists.

You can **view, edit, print and delete Quotes** for your Customers in CRM.

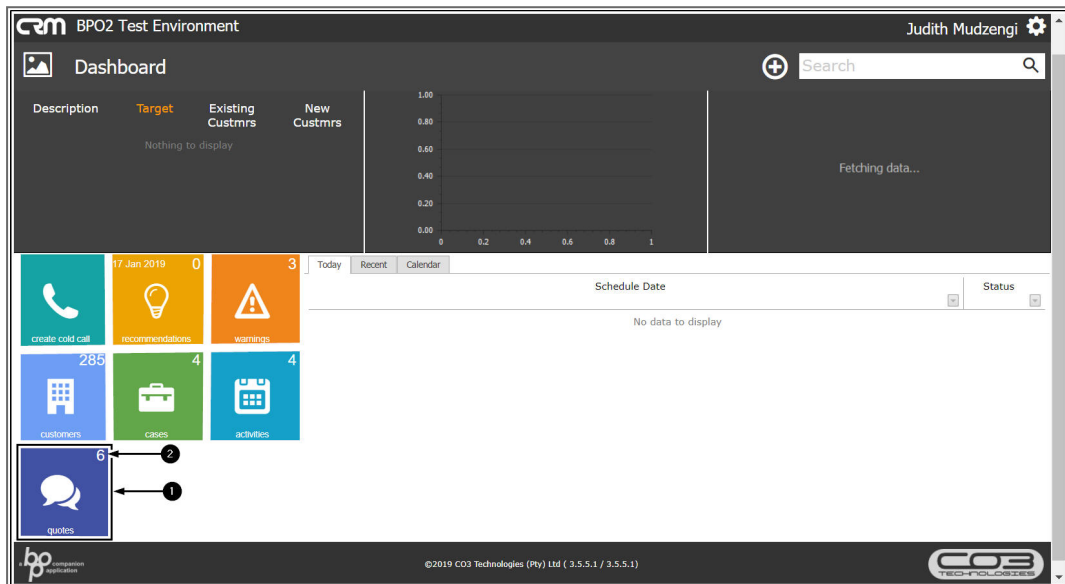
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**Access:** Webpage > [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

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## ACCESS ALL QUOTES FROM THE DASHBOARD

1. Click on the **Quotes** tile from the **Dashboard**.
2. The number in the top right of this tile shows the total number of **New**, **Accepted** and **Rejected** Quotes (for all customers) that are linked to you as the Salesman.



- The **Quotes** listing page will open.
- A list of **New**, **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, will be displayed.


CRM BPO2 Test Environment Judith Mudzengi								
Quotes								
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	No
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362	BU10001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No


## PRINT / EMAIL QUOTE


- Click on the **Quote Number** you wish to **Print / Email**.

CRM BPO2 Test Environment Judith Mudzengi								
Quotes								
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	No
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362	BU10001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

- The **Report Viewer and Emler** screen will be displayed.
- The selected quote will be displayed.
  - You can download the quote and or
  - print the quote.


BPO2 Test Environment




Judith Mudzengi




Report Viewer and Emailer

+ Email Document

SALESQUOTE

2 / 2



**Sales Quote**  
**BPO2 Test Environment**  
1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Reg No.: 111 222 333  
VAT No.: 453 212 5566

1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Fax No.: 0866 212 4455  
Tel No.: 031 555 9873

**Document Ref.:** QT0010358  
**Date:** 15 Aug 2019  
**Sales Person:** Judith Mudzengi  
**Serial No.:**  
**Model No.:**  
**Contract No.:**

**Status:** New Quote  
**Reference:**  
**Attention:** John Smith  
**Customer:** HOP0001 - Hope Works  
**Tel No.:** 031 123 4567  
**Fax No.:**  
**Email:** john@email.co.za  
**VAT No.:**

**Billing Address:**

<b>Repayment Terms:</b>	Cash on Delivery	<b>Repayment Amount:</b>	ZAR	<b>1,062.89</b>
-------------------------	------------------	--------------------------	-----	-----------------

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
2GR05310	LCD Sponge A	1.00	197.80	0.00	197.80	227.47
2HS08190	SPRING ACTUATOR	1.00	865.09	0.00	865.09	994.85

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full	<b>Sub Total</b>	ZAR	<b>1,062.89</b>
	<b>VAT</b>	ZAR	<b>159.43</b>
	<b>Total</b>	ZAR	<b>1,222.33</b>

Receiving Signature

Print Name

Date

Time

45 / 2 items / 2 pages

1 / 1

Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909

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Printed : 28 Aug 2019 16:19


Page 2 of 2

- To email the quote, click on the [ + ] sign in the **Email Document** section.

CRM BPO2 Test Environment
Judith Mudzengi

Report Viewer and Emailer

+ Email Document



**Sales Quote**  
**BPO2 Test Environment**  
1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Reg No.: 111 222 333  
VAT No.: 453 212 5566

1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Fax No.: 0866 212 4455  
Tel No.: 031 555 9873

**Document Ref.:** QT0010358  
**Date:** 15 Aug 2019  
**Sales Person:** Judith Mudzengi  
**Serial No.:** 1  
**Model No.:**  
**Contract No.:**

**Status:** New Quote  
**Reference:**  
**Attention:** John Smith  
**Customer:** HOP0001 - Hope Works  
**Tel No.:** 031 123 4567  
**Fax No.:**  
**Email:** john@email.co.za  
**VAT No.:**

**Billing Address:**

**Repayment Terms:** Cash on Delivery  
**Repayment Amount:** ZAR **1,062.89**

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
2GR05310	LCD Sponge A	1.00	197.80	0.00	197.80	227.47
2HS08190	SPRING ACTUATOR	1.00	865.09	0.00	865.09	994.85

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full

**Sub Total** ZAR **1,062.89**  
**VAT** ZAR **159.43**  
**Total** ZAR **1,222.33**

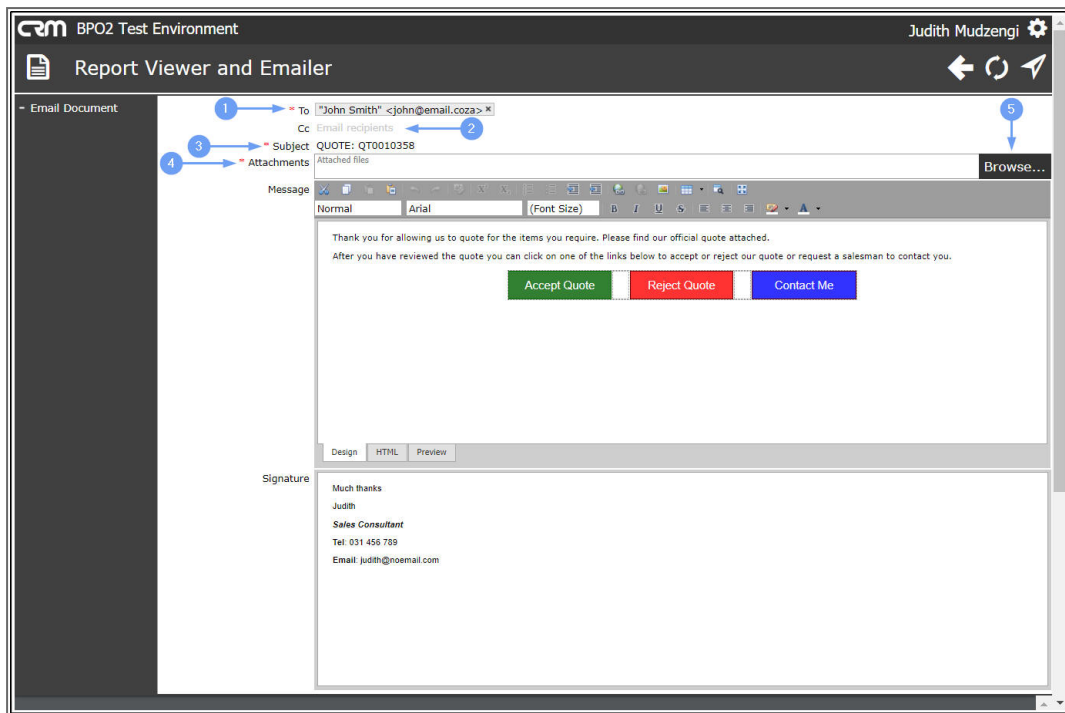
Receiving Signature
Print Name
Date
Time

Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909

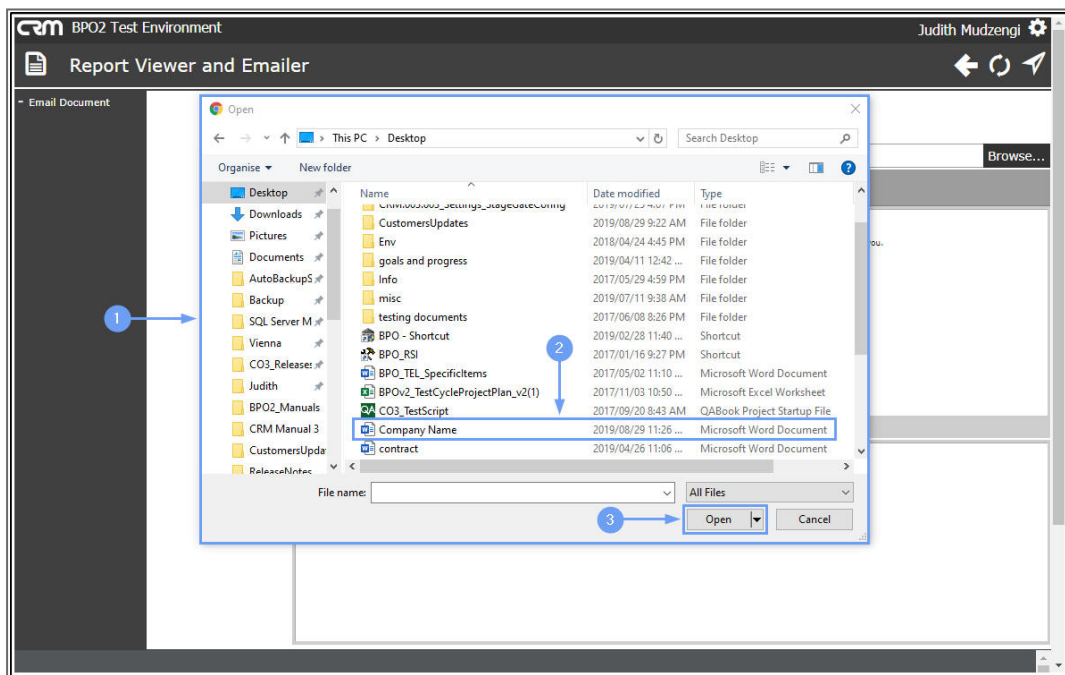
Report created on BPO - www.co3.co.za
Printed : 29 Aug 2019 09:02
Page 2 of 2

The **Email Document** section will be expanded.

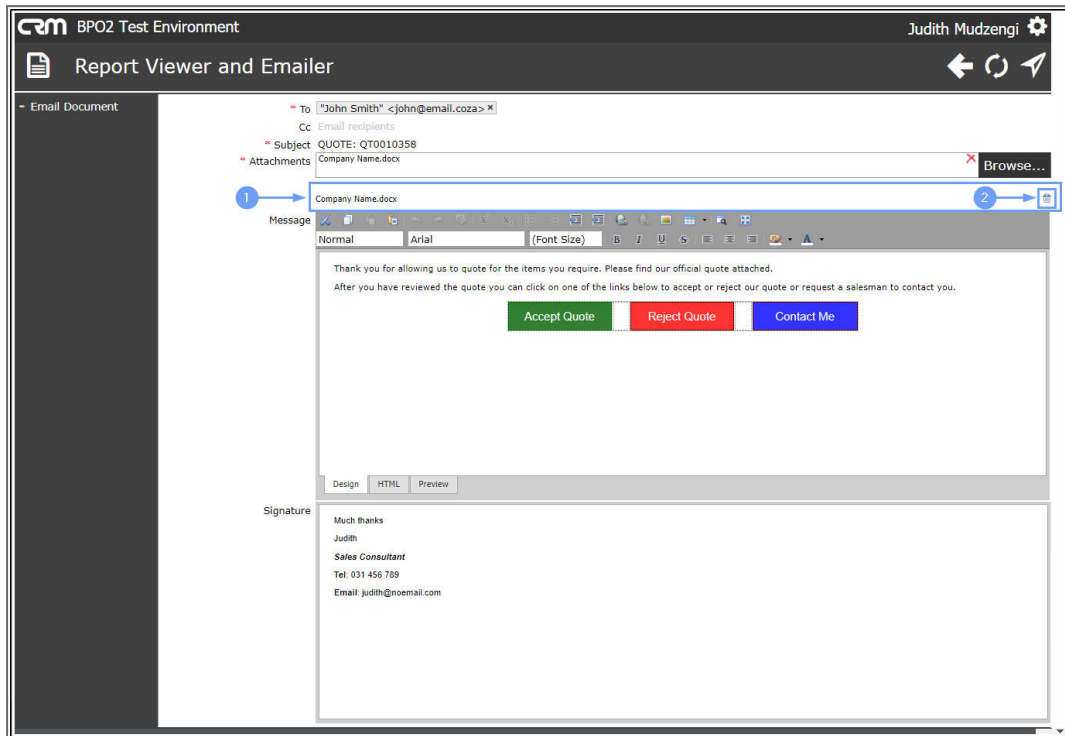
- To:** This field will auto populate with the CRM contact for the case but you can change this if applicable.
- Cc:** In this field, you can add other email recipients if applicable.
- Subject:** This field will auto populate with the selected quote number but you can edit this if applicable.
- Attachments:** You can add other documents as attachments if required.
- To add an attachment, click on **Browse**.



1. The **Open** screen will pop up.
2. Search for and select the file you wish to link.
3. Click on **Open**.

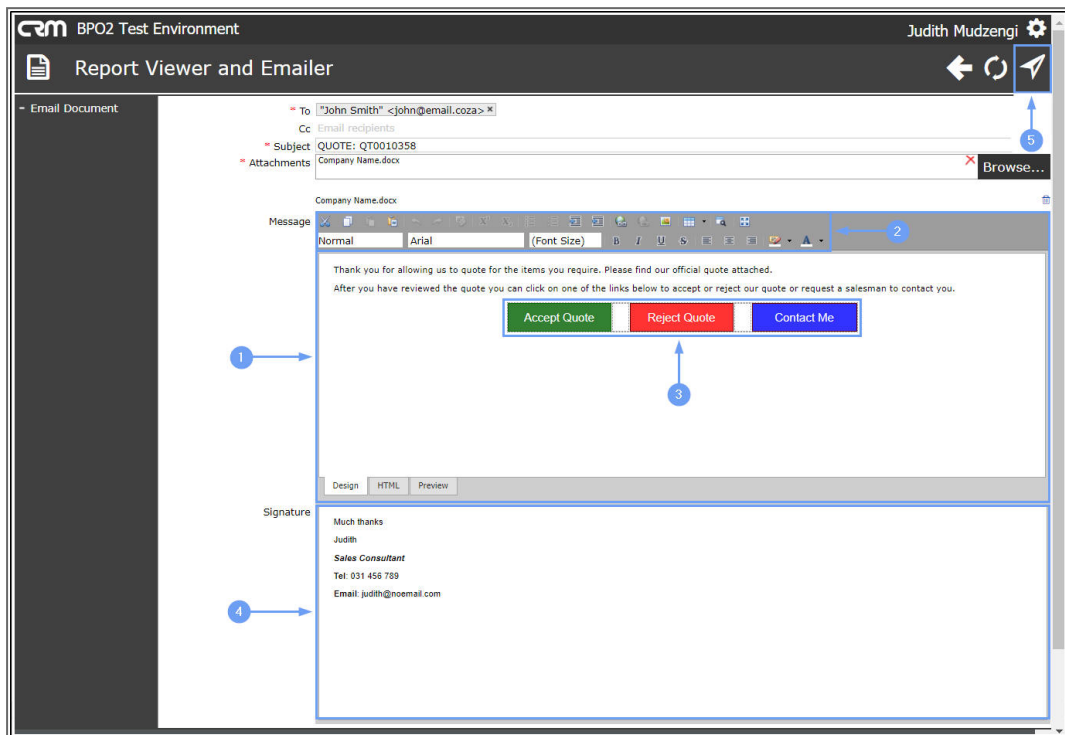


1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on the **Delete** icon.




1. The **message body** may auto populate but you can edit this. Type in the relevant details in the message body.
2. You can use the **tool bar** to customize your email message.
3. The email body has a link that allows the recipient to:
  - **Accept Quote** : The quote will automatically be **marked as accepted** in the **Quotes / Quotes for [ ]** screen when the recipient clicks on **Accept Quote** .
  - **Reject Quote** : The quote will automatically be **marked as rejected** in the **Quotes / Quotes for [ ]** screen when the recipient clicks on **Reject Quote** .
  - **Contact (You)**

4. The **Signature** will auto populate depending on your **personal email settings** or the **default email settings**.
5. When you are done, click on the **Send** icon.



1. A message will pop up telling you the status of the sent email.
2. Click on **Back**.


Email saved to queue.

 Report Viewer and Emailer

2
→
←
↺
↻

**+ Email Document**

1



**Sales Quote**  
**BPO2 Test Environment**

1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Reg No.: 111 222 333  
VAT No.: 453 212 5566

1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Fax No.: 0866 212 4455  
Tel No.: 031 555 9873

---

**Status :** New Quote  
**Reference :**  
**Attention:** John Smith  
**Customer :** HOP0001 - Hope Works  
**Tel No. :** 031 123 4567  
**Fax No. :**  
**Email :** john@email.coza  
**VAT No. :**

**Document Ref.:** QT0010358  
**Date :** 15 Aug 2019  
**Sales Person :** Judith Mudzengi  
**Serial No. :**  
**Model No. :**  
**Contract No. :**  
**Billing Address :**

---

**Repayment Terms :** Cash on Delivery

**Repayment Amount :** ZAR **1062.89**

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
2GR05310	LCD Sponge A	1.00	197.80	0.00	197.80	227.47
2HS08190	SPRING ACTUATOR	1.00	865.09	0.00	865.09	994.85

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full

	Sub Total	ZAR	1062.89
	VAT	ZAR	159.43
	<b>Total</b>	ZAR	<b>1222.33</b>

Receiving Signature

Print Name

Date

Time

Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909

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Printed : 29 Aug 2019 14:24
Page 2 of 2

- You will return to the **Quotes** listing page.

Help v2.5.1.4 - Pg 9 - Printed: 27/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential

CRM BPO2 Test Environment Judith Mudzengi

Quotes

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	No
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362	BUI0001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (6 items) [1] [All] Page size: 10

## View / Edit / Delete Quote

- Click on the **Edit icon** of the quote you wish to **view** / **edit** / **delete**.

CRM

BPO2 Test Environment

Judith Mudzengi

Quotes

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	No
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362	BUI0001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (6 items)

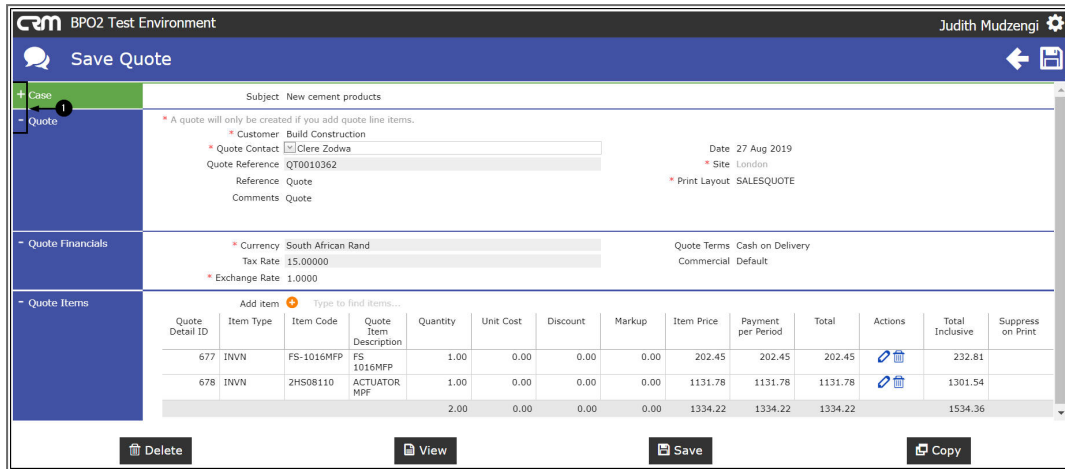
1

10

Page size: 10

The **Save Quote** screen will be displayed.

1. Click on the [ + ] sign to **expand** the frame to view more details or click on the [ - ] sign to **collapse** the frame to view less details.



**CRM BPO2 Test Environment** Judith Mudzengi





**Save Quote**

**Case** Subject: New cement products

**Quote** \* A quote will only be created if you add quote line items.  
 \* Customer: Build Construction  
 \* Quote Contact: Clere Zodiwa  
 Quote Reference: QT0010362  
 Reference: Quote  
 Comments: Quote  
 Date: 27 Aug 2019  
 \* Site: London  
 \* Print Layout: SALESQUOTE

**Quote Financials** \* Currency: South African Rand  
 Tax Rate: 15.0000  
 \* Exchange Rate: 1.0000  
 Quote Terms: Cash on Delivery  
 Commercial: Default

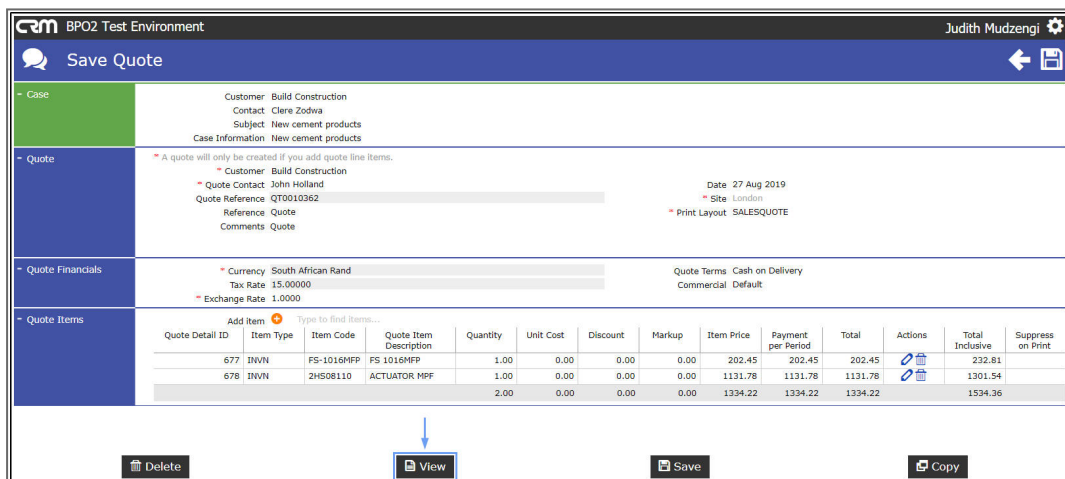
**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45	 	232.81	
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78	 	1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

**Delete** **View** **Save** **Copy**

## View Quote

- Click on **View**.



**CRM BPO2 Test Environment** Judith Mudzengi





**Save Quote**

**Case** Customer: Build Construction  
 Contact: Clere Zodiwa  
 Subject: New cement products  
 Case Information: New cement products

**Quote** \* A quote will only be created if you add quote line items.  
 \* Customer: Build Construction  
 \* Quote Contact: John Holland  
 Quote Reference: QT0010362  
 Reference: Quote  
 Comments: Quote  
 Date: 27 Aug 2019  
 \* Site: London  
 \* Print Layout: SALESQUOTE

**Quote Financials** \* Currency: South African Rand  
 Tax Rate: 15.0000  
 \* Exchange Rate: 1.0000  
 Quote Terms: Cash on Delivery  
 Commercial: Default

**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45	 	232.81	
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78	 	1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

**Delete** **View** **Save** **Copy**

The **Report Viewer and Emailer** screen will be displayed.

1. You can now view the Sales Quote.
2. Click on **Back**.

CRM BPO2 Test Environment

Judith Mudzengi

Report Viewer and Emailer

2

+ Email Document

**Sales Quote**  
**BPO2 Test Environment**  
1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Reg No.: 111 222 333  
VAT No.: 453 212 5566

1 Smith Street  
Morningside  
Durban  
South Africa  
4000  
Fax No.: 0866 212 4455  
Tel No.: 031 555 9873

**Document Ref.:** QT0010362  
**Date:** 27 Aug 2019  
**Sales Person:** Judith Mudzengi  
**Serial No.:**  
**Model No.:**  
**Contract No.:**

**Status:** New Quote  
**Reference:** Quote  
**Attention:** John Holland  
**Customer:** BU0001 - Build Construction  
**Tel No.:** 031 456 789  
**Fax No.:**  
**Email:**  
**VAT No.:** 567849

**Billing Address:**  
3 Colinton Road  
Gillits  
Upper Highway  
3610  
RSA

**Repayment Terms:** Cash on Delivery  
**Repayment Amount:** ZAR **1334.22**

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
FS-1016MFP	FS 1016MFP	1.00	202.45	0.00	202.45	232.81
2HS08110	ACTUATOR MPF	1.00	1131.78	0.00	1131.78	1301.54

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full - Quote

<b>Sub Total</b>	ZAR	<b>1334.22</b>
<b>VAT</b>	ZAR	<b>200.13</b>
<b>Total</b>	ZAR	<b>1534.36</b>

Receiving Signature

Print Name

Date

Time

Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 030909

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Printed : 30 Aug 2019 10:02

Page 2 of 2

- You will return to the **Save Quote** screen.

CRM BPO2 Test Environment

Judith Mudzengi

Save Quote

←

Case

Customer: Build Construction  
Contact: Clere Zodwa  
Subject: New cement products  
Case Information: New cement products

Quote

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

\* Customer: Build Construction

\* Quote Contact: John Holland

Quote Reference: QT0010362

Reference: Quote

Comments: Quote

Date: 27 Aug 2019

\* Site: London

\* Print Layout: SALESQUOTE

Quote Financials

\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Cash on Delivery

Commercial: Default

Quote Items

Add Item

Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	232.81	✎	232.81	
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1301.54	✎	1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1534.36			

Delete

View

Save

Copy

## Edit Quote

## Case Frame

- **Customer:** The customer will auto populate and this field cannot be edited.
- **Contact:** The contact will auto populate and this field cannot be edited.
- **Subject:** The subject will auto populate and this field cannot be edited.
- **Case Information:** The case information will auto populate and this field cannot be edited.

CRM BPO2 Test Environment
Judith Mudzengi
Save Quote

Case

Customer: Build Construction  
Contact: Clere Zodia  
Subject: New cement products  
Case Information: New cement products

Quote

A quote will only be created if you add quote line items.  
Customer: Build Construction  
Quote Contact: John Holland  
Quote Reference: QT0010362  
Reference: Quote  
Comments: Quote  
Date: 27 Aug 2019  
Site: London  
Print Layout: SALESQUOTE

Quote Financials

Currency: South African Rand  
Tax Rate: 15.00000  
Exchange Rate: 1.0000  
Quote Terms: Cash on Delivery  
Commercial: Default

Quote Items

Add Item
Type to find items...


Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

Delete
View
Save
Copy

## Quote Frame

- **Customer:** The customer will auto populate. This field cannot be edited.
- **Quote Contact:** The quote contact will auto populate.

- To change the quote contact, click on the **drop-down arrow** and select an alternative contact, if applicable.
- **Quote Reference:** This quote reference will auto populate with the quote number. This field cannot be edited.
- **Reference:** The reference will auto populate but you can edit this, if applicable.
- **Comments:** The comments will auto populate but you can edit this, if applicable.
- **Date :** The date will auto populate.
  - To change the date, click on the **drop-down arrow** and select an alternative date if applicable.
- **Site:** The site will auto populate. This field cannot be edited.
- **Print Layout :** The print layout will auto populate.
  - To change this, click on the **drop-down arrow** and select an alternative layout, if applicable.

 BPO2 Test Environment
 Judith Mudzengi

Save Quote

Case

Customer: Build Construction  
 Contact: Clere Zodwa  
 Subject: New cement products  
 Case Information: New cement products

Quote

\* A quote will only be created if you add quote line items.  
 \* Customer: Build Construction  
 \* Quote Contact: John Holland  
 Quote Reference: QT0010362  
 Reference: Quote  
 Comments: Quote



Date: 27 Aug 2019  
 Site: London  
 Print Layout: SALESQUOTE

Quote Financials

\* Currency: South African Rand  
 Tax Rate: 15.00000  
 Exchange Rate: 1.0000  
 Quote Terms: Cash on Delivery  
 Commercial: Default

Quote Items

Add Item

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	2H508110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

Delete

View

Save

Copy

### Quote Financials Details Frame

- **Currency:** The currency will auto populate. This field cannot be edited.

- **Tax Rate:** The tax rate will auto populate. This field cannot be edited.
- **Exchange Rate:** The exchange rate will auto populate.
  - To change this, delete the current exchange rate and type in the new exchange rate.
- **Quote Terms:** The quote terms will auto populate.
  - To change this, click on the **drop-down arrow** and select alternative payment terms if applicable.
- **Commercial:** The commercial will auto populate.
  - To change this, click on the **drop-down arrow** and select an alternative commercial if applicable.

CRM BPO2 Test Environment Judith Mudzengi

**Save Quote**

Case  
Customer: Build Construction  
Contact: Clere Zodia  
Subject: New cement products  
Case Information: New cement products

Quote  
\* A quote will only be created if you add quote line items.  
\* Customer: Build Construction  
\* Quote Contact: John Holland  
Quote Reference: QT0010362  
Reference: Quote  
Comments: Quote  
Date: 27 Aug 2019  
\* Site: London  
\* Print Layout: SALESQUOTE

Quote Financials  
\* Currency: South African Rand  
Tax Rate: 15.00000  
\* Exchange Rate: 1.0000  
Quote Terms: Cash on Delivery  
Commercial: Default

Quote Items

Quote Detail ID	Add Item	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP		1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	2HS08110	ACTUATOR MPF		1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
					2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

Delete View Save Copy

### Quote Items Frame

1. **Add Item:** You can **add additional items** to the quote.
2. **Edit Line Item:** Click on the **Edit** icon to **edit a line item**.

**CRM BPO2 Test Environment** Judith Mudzengi



**Save Quote**





**Case**  
Customer: Build Construction  
Contact: Clere Zodwa  
Subject: New cement products  
Case Information: New cement products

**Quote**  
\* A quote will only be created if you add quote line items.  
\* Customer: Build Construction  
\* Quote Contact: John Holland  
Quote Reference: QT0010362  
Reference: Quote  
Comments: Quote  
Date: 27 Aug 2019  
\* Site: London  
\* Print Layout: SALESQUOTE

**Quote Financials**  
\* Currency: South African Rand  
Tax Rate: 15.00000  
Exchange Rate: 1.0000  
Quote Terms: Cash on Delivery  
Commercial: Default

**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

3. **Delete Line Item:** Click on the **Delete** icon.

**CRM BPO2 Test Environment** Judith Mudzengi



**Save Quote**





**Case**  
Customer: Build Construction  
Contact: Clere Zodwa  
Subject: New cement products  
Case Information: New cement products

**Quote**  
\* A quote will only be created if you add quote line items.  
\* Customer: Build Construction  
\* Quote Contact: John Holland  
Quote Reference: QT0010362  
Reference: Quote  
Comments: Quote  
Date: 27 Aug 2019  
\* Site: London  
\* Print Layout: SALESQUOTE

**Quote Financials**  
\* Currency: South African Rand  
Tax Rate: 15.00000  
Exchange Rate: 1.0000  
Quote Terms: Cash on Delivery  
Commercial: Default

**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

- A message will pop up asking you;
  - **Confirm Delete?**
- Click on **Ok**.

CRM BPO2 Test Environment

192.168.100.150:60005 says  
Confirm Delete?

Judith Mudzengi

Save Quote

+ Case

Subject New cement products

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

\* Customer Build Construction

\* Quote Contact John Holland

Quote Reference QT0010362

Reference Quote

Comments Quote

Date 27 Aug 2019

\* Site London

\* Print Layout SALESQUOTE

\* Quote Financials

\* Currency South African Rand

Tax Rate 15.00000

\* Exchange Rate 1.0000

Quote Terms Cash on Delivery

Commercial Default

\* Quote Items

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	2HS08110	ACTUATOR MFP	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

1. The line item will be removed from the **Quote Items** section.

CRM BPO2 Test Environment

Judith Mudzengi

Save Quote

+ Case

Subject New cement products

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

\* Customer Build Construction

\* Quote Contact John Holland

Quote Reference QT0010362

Reference Quote

Comments Quote

Date 27 Aug 2019

\* Site London

\* Print Layout SALESQUOTE

\* Quote Financials

\* Currency South African Rand

Tax Rate 15.00000

\* Exchange Rate 1.0000

Quote Terms Cash on Delivery

Commercial Default

\* Quote Items

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
678	INVN	2HS08110	ACTUATOR MFP	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

## Save Changes

1. Click on either the **Save** button or
2. **Save** icon.

**CRM BPO2 Test Environment** Judith Mudzengi

**Save Quote**

**+ Case** Subject: New cement products

**- Quote**

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

\* Customer: Build Construction

\* Quote Contact: John Holland

Quote Reference: QT0010362

Reference: Quote

Comments: Quote

Date: 27 Aug 2019

\* Site: London

\* Print Layout: SALESQUOTE

**- Quote Financials**

\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Cash on Delivery

Commercial: Default

**- Quote Items**

Add item Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Delete View Save Copy

- A message will pop up informing you that;
  - *Quote saved successfully.*

**Quote saved successfully.**

**Save Quote**

**+ Case** Subject: New cement products

**- Quote**

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

\* Customer: Build Construction

\* Quote Contact: John Holland

Quote Reference: QT0010362

Reference: Quote

Comments: Quote

Date: 27 Aug 2019

\* Site: London

\* Print Layout: SALESQUOTE

**- Quote Financials**

\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Cash on Delivery

Commercial: Default

**- Quote Items**

Add item Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Delete View Save Copy

## Delete Quote

- Click on *Delete*.

Save Quote

Case

Subject New cement products

Quote

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

Customer Build Construction

Quote Contact John Holland

Quote Reference QT0010362

Reference Quote

Comments Quote

Date 27 Aug 2019

Site London

Print Layout SALESQUOTE

Quote Financials

Currency South African Rand

Tax Rate 15.00000

Exchange Rate 1.0000

Quote Terms Cash on Delivery

Commercial Default

Quote Items

Add item

Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Delete

View

Save

Copy

- A message will pop up asking you;
  - *Are you sure you want to delete this quote?*
- Click on **Ok**.

CRM BPO2 Test Environment

192.168.100.150:60005 says

Judith Mudzengi

Save Quote

Are you sure you want to delete this quote?

OK

Cancel

Case

Subject New cement products

Quote

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

Customer Build Construction

Quote Contact John Holland

Quote Reference QT0010362

Reference Quote

Comments Quote

Date 27 Aug 2019

Site London

Print Layout SALESQUOTE

Quote Financials

Currency South African Rand

Tax Rate 15.00000

Exchange Rate 1.0000

Quote Terms Cash on Delivery

Commercial Default

Quote Items

Add item

Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Delete

View

Save

Copy

- The quote will be removed from the **Quotes** screen.

CRM BPO2 Test Environment Judith Mudzengi									
Quotes									
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue	
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes	
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes	
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No	
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No	
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No	

## MARK QUOTE AS ACCEPTED

- Click on the *Mark Quote As Accepted* icon.

CRM BPO2 Test Environment Judith Mudzengi									
Quotes									
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue	
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes	
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes	
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No	
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No	
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No	

- A message will pop up asking you;
  - Are you sure you want to set this quote as accepted?*
- Click on *Ok*.

CRM BPO2 Test Environment

192.168.100.150:60005 says  
Are you sure you want to set this quote as accepted?

OK Cancel

Judith Mudzengi

← ↻

Quotes

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items)

11 All

Page size: 10

- The **Edit Quote icon** and **Mark Quote As Accepted icon** will become inactive (greyed out) when the quote is marked as accepted.

CRM BPO2 Test Environment

Judith Mudzengi

Quotes

← ↻

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items)

11 All

Page size: 10

## MARK QUOTE AS REJECTED

- Click on the **Mark Quote As Rejected icon**.

- A message box will pop up asking you;
  - *Are you sure you want to set this quote as rejected?*
- Click on *Ok*.

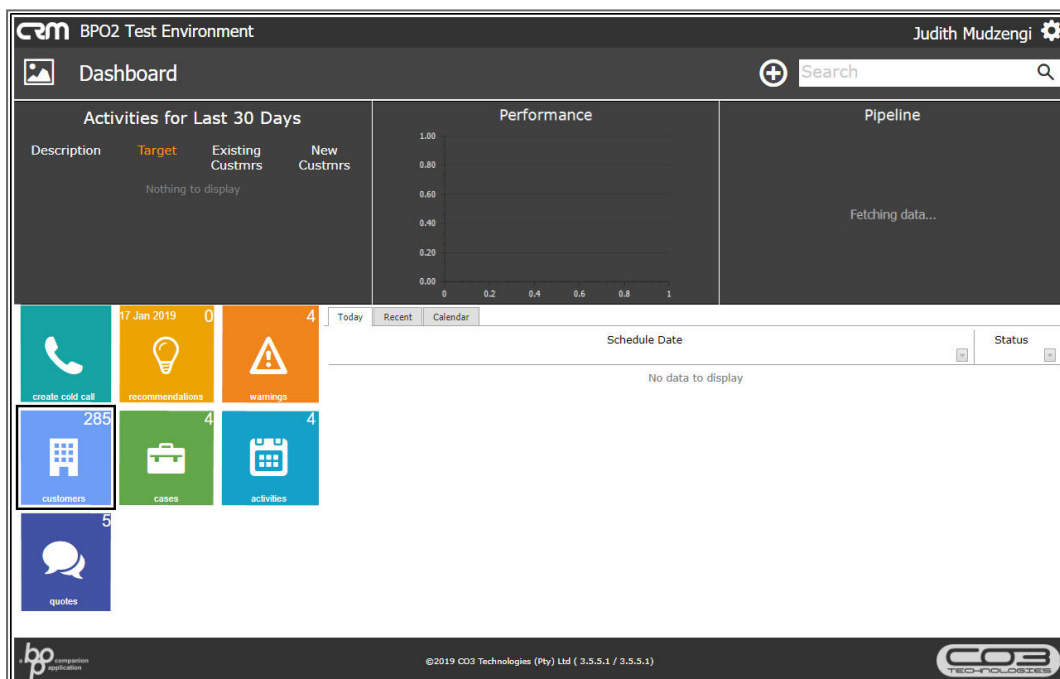
- The **Edit Quote icon** and **Mark Quote As Rejected icon** will become inactive (greyed out) when the quote is marked as rejected.

CRM BPO2 Test Environment Judith Mudzengi								
Quotes								
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items) Page size: 10

## ACCESS CUSTOMER SPECIFIC QUOTES FROM HOME PAGE

1. Click on the **Customers** tile in the **Home page**.



The screenshot shows the CRM BPO2 Test Environment Dashboard. The top navigation bar includes the CRM logo, 'BPO2 Test Environment', and the user name 'Judith Mudzengi'. The main dashboard area is divided into several sections:

- Activities for Last 30 Days:** A table with columns for Description, Target, Existing Custmrs, and New Custmrs. It currently shows 'Nothing to display'.
- Performance:** A line chart showing performance metrics over time, with a y-axis ranging from 0.00 to 1.00.
- Pipeline:** A section labeled 'Fetching data...'.
- Quick Actions:** A row of three tiles: 'create cold call' (phone icon), 'recommendations' (lightbulb icon), and 'warnings' (warning triangle icon).
- Customer Metrics:** A row of three tiles: 'customers' (285), 'cases' (4), and 'activities' (4).
- Quotes:** A tile with a speech bubble icon and the number 5.
- Schedule Date:** A section with a 'Today' tab and a 'Status' dropdown, currently showing 'No data to display'.

The bottom of the dashboard features the 'bpo' logo, copyright information '©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1 )', and the 'CO3 TECHNOLOGIES' logo.

- The **Customers** listing page will open.
- All of the customers will be listed here.

CRM BPO2 Test Environment Judith Mudzengi

Customers

Type Customer name search filter here...

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3Rd Generation Client-Server	71505527	Abigail Milne	031 234 567	abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71505435				25%	Active		Yes	No
?	Adapter Holistic	71505360				25%	New - CRM		No	No
?	Adult Education Zope	71505302				25%	New - CRM		No	No
?	Advanced Feedmix	71505323				25%	New - CRM		No	No
?	Advanced Kimmel	71505324				25%	New - CRM		No	No
?	Aerospace Engineering Kubuntu	71505310				25%	New - CRM		No	No

1. Type in the customer name you wish to access quotes for in the **Search** bar.
2. The system will filter for and display the customer in this page.
3. Click on the **View** icon.

CRM BPO2 Test Environment Judith Mudzengi

Customers

1 → build

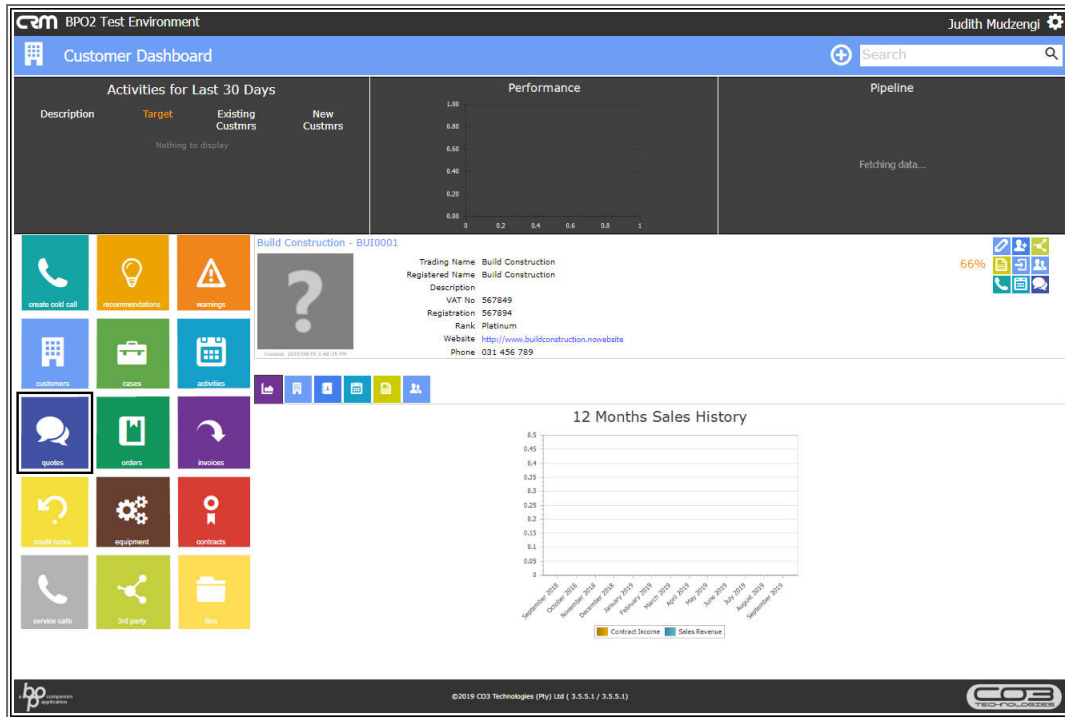
View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Build Construction	BUI0001	John Holland	031 456 789		66%	New - CRM	Platinum	No	Yes

3 →

Page 1 of 1 (1 items) [1] [2] [All] Page size: 10

2 →

- The **Customer Dashboard** screen will be displayed.
- Click on the **Quotes** tile.



- The **Quotes for [selected customer]** page will open.
- All of the quotes linked to this customer will be displayed (even ones where you are not the Salesman).
- For more information refer to **CRM Customers: Quotes**.

CRM BPO2 Test Environment Judith Mudzengi								
Quotes for Build Construction								
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUI0001	Build Construction	Quote	2136.51	ZAR	27 Aug 2019	New Quote	No

CRM.000.015

