

CRM BASICS

QUOTE PRODUCT CONFIGURATION

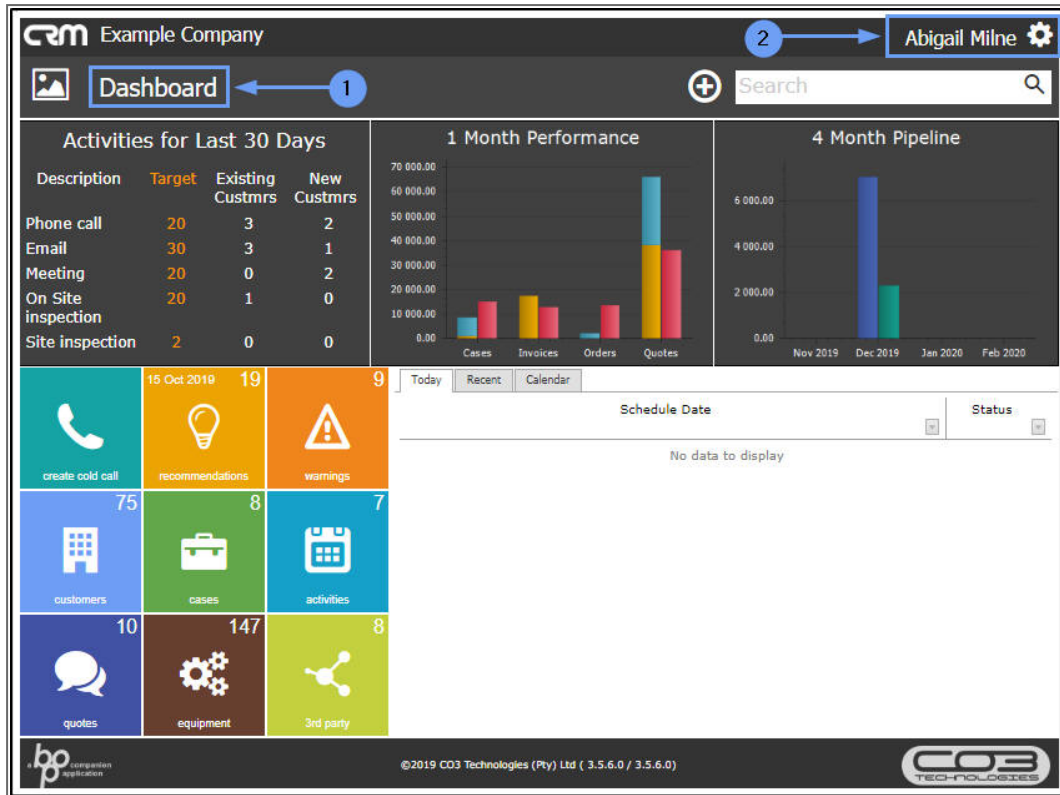
You need to configure Quote **products** in order to be able to select them as single line items on a Quote.

Product **images** can be linked to the items - which can pull through on customised Quote templates.

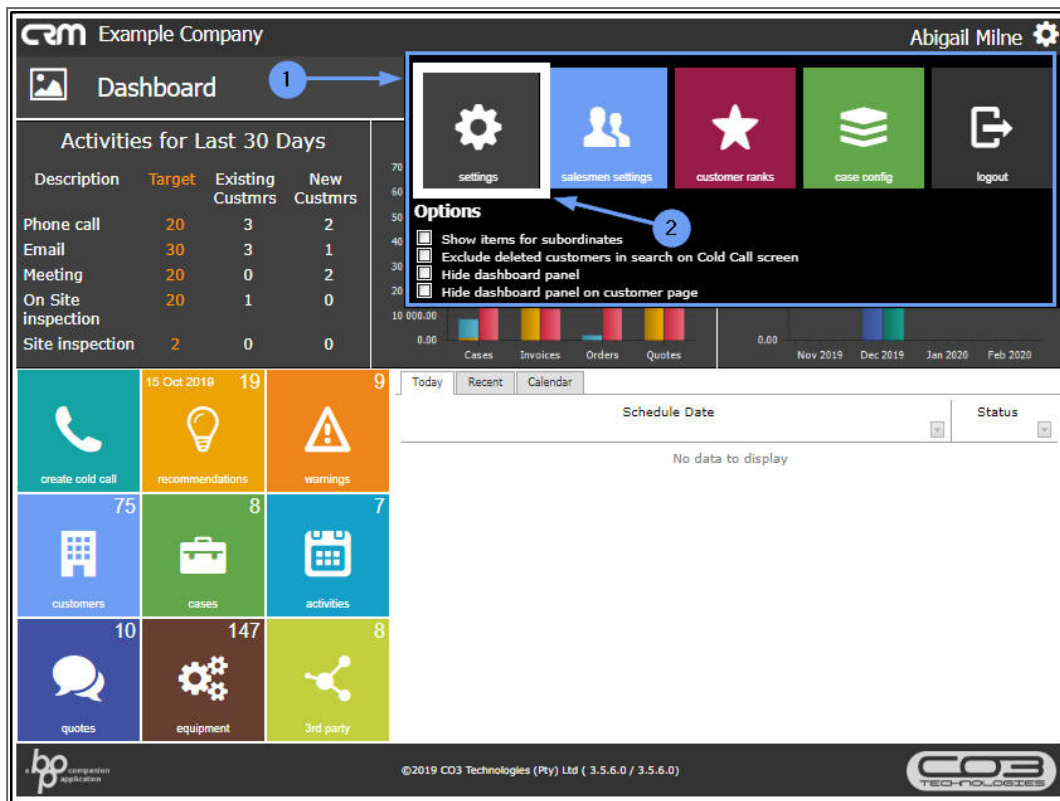
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

NAVIGATE TO QUOTE PRODUCTS

1. In the **Dashboard** (Home page),
2. Hover over the **User Name** or **Settings** icon.



1. The **Settings Options** frame will be displayed.
2. Click on **Settings**.

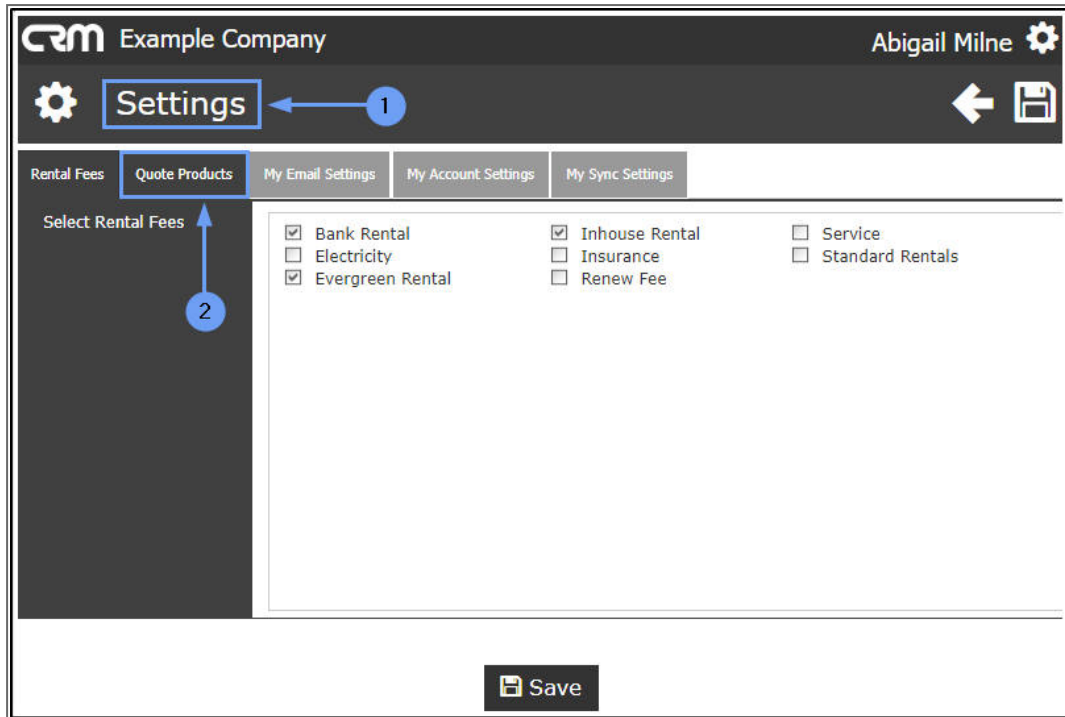


The screenshot shows the CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' tab, a table of 'Activities for Last 30 Days', and a grid of quick-action tiles. A settings menu is open, showing options for 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A blue arrow points to the 'settings' tile, and another blue arrow points to the 'Options' section.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site	20	1	0
Inspection			
Site inspection	2	0	0

Tile	Icon	Count
create cold call	Phone	15 Oct 2019
recommendations	Lightbulb	19
warnings	Warning	9
customers	Building	75
cases	Briefcase	8
activities	Calendar	7
quotes	Speech bubble	10
equipment	Gears	147
3rd party	Share	8

1. The **Settings** page will open.
2. Click on the **Quote Products** tab.



CRM Example Company Abigail Milne

Settings

Rental Fees **Quote Products** My Email Settings My Account Settings My Sync Settings


Select Rental Fees


- ☒ Bank Rental
- ☐ Electricity
- ☒ Evergreen Rental
- ☒ Inhouse Rental
- ☐ Insurance
- ☐ Renew Fee
- ☐ Service
- ☐ Standard Rentals




Save

QUOTE PRODUCTS LISTING PAGE











1. A full list of **inventory** (part) **definitions** from BPO will be displayed.
2. The **Page Reference** field indicates how many pages of items there are and how many items are listed in total (e.g. Page 1 of 10 (97 items)).
3. The **bold** number indicates which page is currently open. In this example, page **1** (of 10) is open.
4. The **Page size** field indicates how many lines of items are listed on each page (in this example there are currently 10 items listed per page).


Example Company

Abigail Milne



Settings




Rental Fees
Quote Products
My Email Settings
My Account Settings
My Sync Settings

Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	<input checked="" type="checkbox"/>
	2020-147K	Black toner SP2020	<input checked="" type="checkbox"/>
	SP1919	SP1919 Sprint Colour MFC	<input checked="" type="checkbox"/>
	SP19-147K	Black Toner SP1919	<input checked="" type="checkbox"/>
	SP19-147C	Cyan Toner - SP1919	<input type="checkbox"/>
	SP19-147Y	Yellow Toner - SP1919	<input checked="" type="checkbox"/>
	SP19-147M	Magenta toner - SP1919	<input checked="" type="checkbox"/>
	2020-147M	Magenta toner SP2020	<input checked="" type="checkbox"/>
	2020-147C	Cyan toner SP2020	<input checked="" type="checkbox"/>
	CL-100-965	Cleaner	<input checked="" type="checkbox"/>

Page 1 of 10 (97 items)

Page size: 10

[Create Filter](#)

 Save

SEARCH / FILTER QUOTE PRODUCT ITEM

1. You can use the [Filter Search Row](#), or the
2. [Create Filter](#) functionality to search for a particular item.
3. Click on a **Part Image**.

CRM

Example Company

Abigail Milne

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Settings

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Rental Fees

Quote Products

My Email Settings

My Account Settings

My Sync Settings











1

Part Image

Part Number

Part Name

Available for CRM Quotes

	SP2020	SP2020 Sprint Colour Multi Functional Copier	<input checked="" type="checkbox"/>
	2020-147K	Black toner SP2020	<input checked="" type="checkbox"/>
	SP1919	SP1919 Sprint Colour MFC	<input checked="" type="checkbox"/>
	SP19-147K	Black Toner SP1919	<input checked="" type="checkbox"/>
	SP19-147C	Cyan Toner - SP1919	<input type="checkbox"/>
	SP19-147Y	Yellow Toner - SP1919	<input checked="" type="checkbox"/>
	SP19-147M	Magenta toner - SP1919	<input checked="" type="checkbox"/>
	2020-147M	Magenta toner SP2020	<input checked="" type="checkbox"/>
	2020-147C	Cyan toner SP2020	<input checked="" type="checkbox"/>
	CL-100-965	Cleaner	<input checked="" type="checkbox"/>

Page 1 of 10 (97 items)

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Page size: 10

Create Filter

2

Save

EDIT / UPDATE QUOTE PRODUCT ITEM

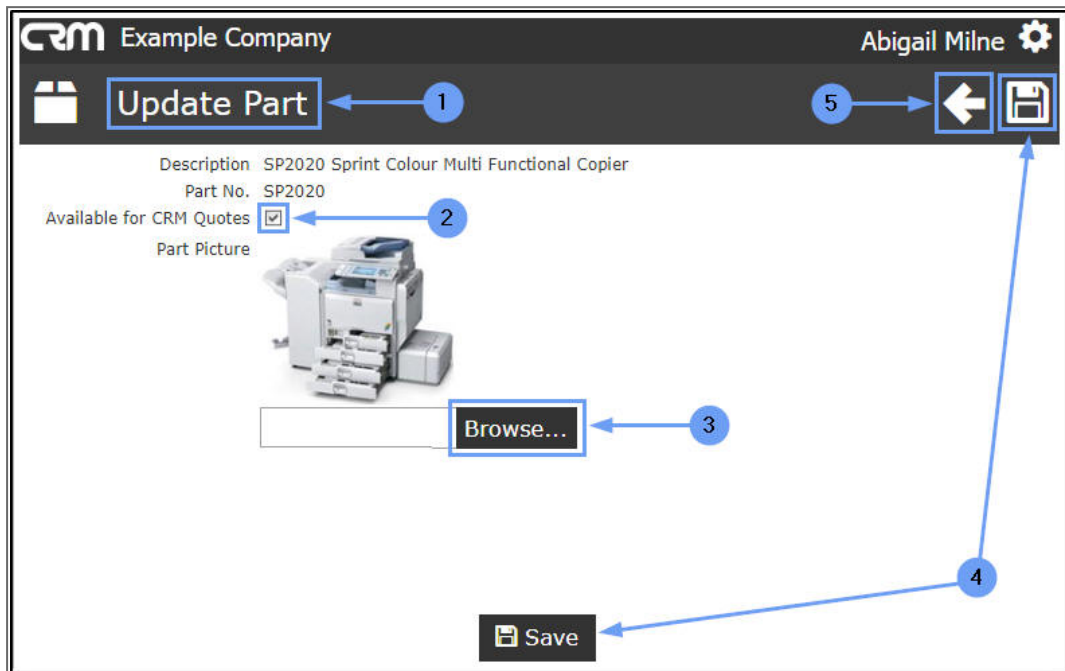
1. The **Update Part** page will open.
2. You can edit the **Available for CRM Quotes** check box.
 - Marking this check box will make this part code available for selection when adding single items to a quote.
3. **Browse** for a product picture, if required.

Either

4. Click on **Save** if you have made any changes and wish to keep them.

Or

- Click on **Back** to return to the previous page.



MARK PRODUCT ITEM AS AVAILABLE


- In the **Settings** page,
- You can also mark whether the item is **Available for CRM Quotes**.
- This is helpful, if you wish to configure multiple items at a time.


Either


- Click on **Save** if you have made any changes and wish to keep them.



Or

- Click on the **Settings** icon or the **CRM** logo to return to the Dashboard (Home page).


Example Company

Abigail Milne



Settings











Rental Fees

Quote Products

My Email Settings

My Account Settings

My Sync Settings


Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	<input checked="" type="checkbox"/>
	2020-147K	Black toner SP2020	<input checked="" type="checkbox"/>
	SP1919	SP1919 Sprint Colour MFC	<input checked="" type="checkbox"/>
	SP19-147K	Black Toner SP1919	<input checked="" type="checkbox"/>
	SP19-147C	Cyan Toner - SP1919	<input type="checkbox"/>
	SP19-147Y	Yellow Toner - SP1919	<input checked="" type="checkbox"/>
	SP19-147M	Magenta toner - SP1919	<input checked="" type="checkbox"/>
	2020-147M	Magenta toner SP2020	<input checked="" type="checkbox"/>
	2020-147C	Cyan toner SP2020	<input checked="" type="checkbox"/>
	CL-100-965	Cleaner	<input checked="" type="checkbox"/>

Page 1 of 10 (97 items)

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Page size: 10

[Create Filter](#)


Save

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